



## Wisconsin Deferred Compensation Program

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[www.wdc457.org](http://www.wdc457.org)

April 27, 2018

Ms. Shelly Schueller  
Department of Employee Trust Funds  
4822 Madison Yards Way  
P.O. Box 7931  
Madison, WI 53707-7931

Dear Shelly:

Empower Retirement is pleased to provide its first ever Annual WDC Plan Review outlining the growth figures for 2017 and including the historic Annual Statistics Report.

In 2017, we achieved plan goals such as in-force growth and number of education meetings while experiencing staff turnover as we implemented our enhanced service model. The retirement readiness review experience has been very well received by participants and employers, as measured by the fact that 31% of the individuals who met with a Retirement Plan Advisor in 2017 took action on their account.

During 2017, we continued to upgrade communication efforts to include the use of technology. Videos were leveraged both on the website and via email and on ETF's Twitter account. Topics included enrollment, diversification and consolidating assets. Stay in the Plan and Meet with Your Rep campaigns were created to increase awareness of our new service model and encourage participants to request a retirement readiness review.

Technology was also leveraged in 2017 to allow for online and phone distributions as well as increased security of participant accounts.

One-on-one appointments with participants continued to increase in length and demand due to the complete retirement readiness review process being implemented. We experienced several mergers of employers, and Dane County transferred its deferred compensation plan to the WDC at the end of 2017.

WDC staff attended three conventions and 58 benefits fairs throughout the state. We also added 9 new employers.

Shelly, Empower Retirement looks forward to working with you and the Wisconsin Deferred Compensation Board in the years to come, and values being your business partner.

Sincerely,

Emily S. Lockwood  
State Director

enclosure