



*Helping You Turn
Over a New
Retirement Leaf*



2022 Strategic Partnership Plan (SPP)

2022 Scorecard

Goal/Action Item	Tools adopted	Results desired
Enrollment	<ul style="list-style-type: none"> Employee and Employer 	<ul style="list-style-type: none"> Increase number of in-force* accounts by 2.5% (69,626) Add 12 new local public employers Attend 1 or 2 conventions
Asset Allocation	<ul style="list-style-type: none"> Retirement Readiness Reviews with at-risk** groups Free trial period 	<ul style="list-style-type: none"> Complete Retirement Readiness Reviews with 5% (970) of at-risk population Increase managed account users by 2% (383 new users)
Education	<ul style="list-style-type: none"> Participant Education <ul style="list-style-type: none"> Save more New website Group and individual meetings Employer Education Financial wellness <ul style="list-style-type: none"> Lifetime Income Score Celebrate WDC's 40th anniversary 	<ul style="list-style-type: none"> Complete 2,800 total Retirement Readiness Reviews Increase deferral amounts by 5% for targeted audience (Participants saving 1% or \$50; Participants who haven't increased in 2+) Increase new website users by 7% (2,745 new users) Obtain a 6%+ clickthrough rate on Lifetime Income Score campaign and monitor interactions with the tool Provide 415 group meetings Drive positive actions equaling 40%+ of meetings
Retention	<ul style="list-style-type: none"> Retirement Readiness Reviews Retiree webinar 	<ul style="list-style-type: none"> Meet with 500+ retirees/terminated participants Increase asset retention by 5%+ (roll out less than \$97.7)



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*In-force means net lives or number of participants with an account balance greater than \$0.

**At-risk population = 50+ >75% equities; 50+ <10% equities; all ages <25% equities

***Positive actions include actions like enrollments, rollovers, deferral increases, diversification (moving 100% to TDF or enroll in managed accounts), and personalization for those in managed accounts

Note: Recurring goals such as group meetings and in-force growth are based on average of last three years (2018-2020)

2022 Communications Proposal

Q1

America Saves Week: February 21-25

Goal: Save More

Audience: Participants saving 1% or \$50; Participants who haven't increased in 2+

Tactics:

- Email
- Flyer: employers
- Web banner
- Social media post

Q2

New web experience: March

Goal: See the new web experience, aggregate accounts

Audience: All participants

Tactics:

- Email
- Mailer
- Web banner
- Social media post
- Video
- ETF newsletter article

Annual participant survey

Email, web banner, social media post

Q3

Lifetime Income Score Campaign: September

Goal: Go online, check LIS score, save more, meet with Plan Advisor

Audience: Active participants with LIS 70-100%; Active participants with LIS under 70%

Tactics:

- Email: 2 personalized
- Mailer
- Social media post
- Web banner and video
- Post-login plan message

My Total Retirement 90-Day Free Look Campaign (August-October): 3 emails and mailer

Q4

Terminated Checkup campaign: November

Goal: Stay in the Plan (review fees), check investments, meet with your RPA, attend retiree webinar

Audience: Termed under 58; termed over 58 (retiree)

Tactics:

- Emails - 2
- Mailer
- Social media posts - 2
- Retiree Webinar

Employer communications:

- Newsletter
- Non-participating employer outreach
- Benefits fairs and conventions
- Employer plan reviews as needed/requested
- Survey
- Survey email
- Webinar

- Retirement Readiness Reviews with Retirement Plan Advisors – daily
- Retirement Solutions Group terminated participants mailer – monthly to weekly
- At-risk participants automated campaign – in batches
- Certified Financial Planning campaigns – 2x/year (April and end of October)



ETF Communications Partnership

- Calendar of semi-monthly tweets
- Active and retiree newsletter articles
- 40th anniversary of WDC



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