



August 2, 2024

Strategic Partnership Plan Update

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2024 WDC Strategic Partnership Plan



Helping You Turn
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Retirement Leaf

Steppingstones Campaign (Winter and Fall)

Goal: Educate participants on how Social Security, the WRS pension and WDC Program fit together in their retirement picture

Audience: New hires, mid-career and pre-retiree participants

Tactics:

- Email
- Web banner
- Social media post
- Webinar

Fraud Prevention/Email Capture Campaign

Goal: Educate participants with tips and best practices to help them stay ahead of cybersecurity threats and other types of fraudulent communications/activities

Audience: Active and terminated participants with a balance

Tactics:

- Webinars
- Email
- Pre-login pop-ups
- Self-send email
- Social media post
- ETF newsletter article

At Risk Campaign

Goal: Encourage participants to meet with their local WDC RPA for a complimentary Retirement Readiness Review (RRR) and provide a free trial of managed accounts along with the campaign.

Audience: At-risk ppts, active and terminated, with a balance

Tactics:

- Email
- ETF newsletter article
- Web messaging
- Social media post
- Video

Enrollment Campaign/ National Retirement Security Month (NRSM)

Goal: Enroll, attend a webinar and/or meet with an RPA

Audience: Non-participating employees (via WDC employers) and all participants

Tactics:

- Self-send email for WDC employers to share with employees (from ETF)
- Email promoting webinars & RPAs
- Social media posts – 2 to 4
- Web banner
- ETF newsletter article
- Webinars

Empower Communications Engine (ECEs)

Goal: Deliver personalized automated messaging to participants

Audience: Targeted by topic/interaction

Topics:

- Benefits of using the personalized website
- Welcome to your retirement plan
- Update your beneficiary and profile
- Save More
- Invest Wisely
- Get help with financial wellness (CFP)
- RPA Investment Advice
- RPA Near-retiree/retiree
- Key milestones ages (RSG)
- Do you need help investing?
- Welcome to professionally managed accounts
- Engage with your professionally managed account
- Your retirement savings options (RSG)
- Ongoing guidance for stay-in-plan terminated ppts
- **Terminated participants mailer**

Q1 Communication updates:

- ETF newsletter articles
- 2024 social posts (if applicable for ETF)
- Enrollment mailing to all non-participating employees (per ETF)

Q2 Communication updates:

- ETF newsletter articles
- 2024 Annual Participant Satisfaction Survey
 - Targeted Emails (x2)
 - Web messaging

Q3 Communication updates:

- ETF newsletter articles

Q4 Communication updates:

- ETF newsletter articles

Employer communications:

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

Ongoing activities:

1. Retirement Readiness Reviews with Retirement Plan Advisors (RPAs) including Best Interest Profile advice experience
2. Bi-weekly “NEO” webinars hosted by RPAs for non-participating employees
3. Promote Empower’s *The Currency* to non-participating employees and participants
4. Secure 2.0 / Limit Updates
5. Ongoing Library of Material review
6. News & Updates articles (4-5)

Operational Updates

- Online Required Minimum Distributions (RMDs) ✓
- Forced out RMDs in 2025
- Plan Document enhancements
- SECURE 2.0 implementation
- Partner with ETF on employer data initiative



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SPP Progress Report



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Dimension	Activity	Objective	Audience	Results as of 7/31/24
All	NRSM/Open Enrollment Campaign	Enroll, attend a webinar and/or meet with an Retirement Plan Advisor (RPA)	All participants	Q4
All	ECEs	Various	Various	Results attached
All	2024 social media posts (if applicable)	Increase WDC awareness via ETF's Twitter and LinkedIn profiles	ETF followers	Complete
All	Group meetings	Conduct 400 group meetings for employers and participants	Participating employers/participants	198
All	Employer newsletter Employer webinars Employer survey	Quarterly outreach to employers	Participating Employers	Complete/In progress
Asset Allocation	At-Risk Campaign	Increase Retirement Readiness Reviews, promote advice and staying in the plan	At-risk participants, active and terminated with a balance	Q3
Asset Allocation	Retirement Readiness Reviews (RRRs)	Conduct 2,700 Retirement Readiness Reviews with participants	All participants	1,915
Education	Steppingstones to Retirement benefit summit	Educate participants on how SSA, WRS and WDC fit together	New hires, mid-career and pre-retiree participants	April 17: 1,270 registered; 616 attended 4.63/5 overall satisfaction rate November 7: Stay tuned
Education	Fraud Prevention/Email Capture Campaign	Educate participants about cybersecurity and protecting their accounts	Active and terminated participants with a balance	729 account registrations

SPP Progress Report cont'd



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Dimension	Activity	Objective	Audience	Results as of 7/31/24
Education	News & Updates articles	Keep participants up-to-date with changes in the WDC (ex. SECURE 2.0 and plan document updates)	All participants and employers	Ongoing
Education	Offer Empower's <i>The Currency</i>	Promote financial wellness to all employees whether enrolled in WDC or not	Everyone	News & Updates, ETF newsletter(s), Employer mini-newsletter
Education & Enrollment	Conventions	Attend at least one convention	Local associations of public employees (ex. WMCA)	WMCA 8/28-30, Middleton
Education & Enrollment	Open Enrollment/Benefits fairs	Host 25+ webinars/events during the annual Open Enrollment period	All eligible employees	Q4
Education & Retention	ETF newsletter articles (if applicable)	Various	Active and retired WRS members	In progress
Enrollment	Eligible employee outreach	Increase enrollment in WDC	WRS-eligible employees not enrolled in WDC	Postcard mailed to 84k eligible employees 4/24/24; 92 QR scans
Enrollment	Enrollment Campaign during open enrollment and NRSM	Increase participation in WDC	Eligible employees	Q4

SPP Progress Report cont'd



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Dimension	Activity	Objective	Audience	Results as of 7/31/24
Enrollment	Bi-weekly webinars	Provide a New Employee Orientation (NEO) opportunity for all new hires	New hires	235 attendees
Enrollment	In-force growth	Enroll eligible employees and retain participants to grow the WDC by 1.5%	Eligible employees and participants	0.79%; 39% to goal
Enrollment	Non-participating employer outreach	Add new employers to the WDC	Non-participating employers	Q4
Enrollment	New employers	Add 12 new employers to the WDC	Eligible employers	11; 92% to goal
Retention	Call center and RPA surveys (NPS)	Measure participant satisfaction with customer care center and field staff	Participants who call and/or meet with their Retirement Plan Advisor	Call Center Sat. Score = 4.37/5 (as of 7/29) RPA NPS = 84
Retention	2024 custom annual participant satisfaction survey	Obtain feedback from participants	All participants	See pages 18-23
Operational	SECURE 2.0 Implementation	Implement SECURE 2.0 provisions as adopted by the WDC	All applicable	Ongoing
Operational	Execution of Plan and Trust Document	Ensure changes to plan document are executed by service team	As applicable	As needed

Personalized advice from an Empower RPA



Set the agenda for the meeting

Introduce retirement plan advisor (RPA) and help employee understand the RPA role as an ongoing resource

Listens with empathy, addresses questions, and follows a structured process to help drive action



Account review and goal setting

Build personal financial profile (e.g., Social Security, pension amount, outside accounts, and other income)

Discusses desired retirement goals (e.g., age and lifestyle)



Retirement assessment

Perform diagnostic assessment to assess goal tracking to help answer the question of "Am I on track?"

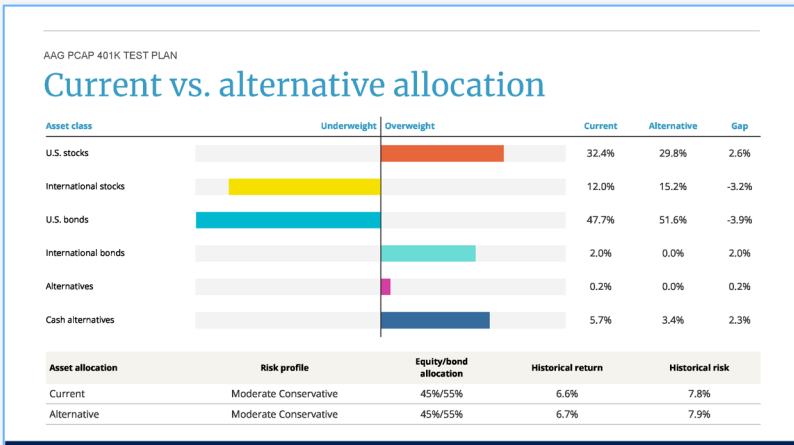
Uses our technology to run simulations



Review analysis and next steps

Deliver advice to help with savings strategies, investment diversification, and spend down

Provides a written plan and has the ability to implement changes



FOR ILLUSTRATIVE PURPOSES ONLY

The Retirement Readiness Review is provided by an Empower representative registered with Empower Advisory Group, LLC and may provide investment counseling and/or recommendations at no additional cost to participants. There is no guarantee provided by any party that use of the review will result in a profit.

Meetings at-a-glance (as of 7/31/24)



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Meetings drive participant outcomes

2,152 Positive Actions Taken

424

enrollments

372

diversifications

ASSETS DIVERSIFIED \$78M

677

personalizations

ASSETS PERSONALIZED \$86M



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As of 7/31/24

Q1 WDC Communications

- Annual Updates – Live and posted on the website
- Retirement Readiness Review TV Monitor Slide
- News and Updates
 - Plan and Trust Document Changes
- ETF Newsletter articles
- 2024 Social Posts (X and LinkedIn)
- Term/retention Letter



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News & Updates

- News and Update article:
 - Plan and Trust Document Changes

▶ [Plan and Trust Document Changes Effective January 1, 2024](#)

January 5, 2024


As of January 1, 2024, the definition of a Designated Roth Contribution has changed for elective deferrals. Treatment of the designated contributions by participants and the WDC are explained in the updated Plan and Trust document. [Click here](#) for more details.



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Retirement Readiness Review TV Slide

TV Monitor slide created to promote Retirement Readiness Reviews



Interested in a personalized retirement readiness review?

A complimentary review from your local WDC Retirement Plan Advisor (RPA)¹ can help you determine:

- How your assets are allocated
- Your savings rate
- Your planned retirement age
- The amount or percentage of your pre-retirement income you will need to replace
- Your retirement readiness
- And more!

Scan the QR code to schedule your complimentary WDC meeting today!

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¹ The Retirement Readiness Review is provided by an Empower representative registered with Empower Financial Services, Inc. and may provide recommendations at no additional cost to participants. There is no guarantee provided by any party that use of the review will result in a profit. RO3350232-0124




ETF Newsletter Articles

- WRS News Online – May 2024:

Facing a Taxing Situation? Pay Less in Taxes Today While Saving More for Tomorrow



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Your contributions to the Wisconsin Deferred Compensation Program (WDC) are made with pretax dollars, which means every dollar you save may reduce your taxable income. And as you save on taxes, you may be able to save even more for your future to help maximize your retirement income. If applicable, you may even save with post-tax dollars to reduce future taxable income during retirement. [More benefits of enrolling in WDC > | Pretax vs. Roth: What's the Difference?](#)

WDC Webinar
Join a 30-minute live session for new employees wanting to know more about the WDC Program. [See schedules and register >](#)

WDC Participant Survey Take this quick survey and help improve your experience with the WDC Program. Responses are confidential. [Take WDC survey >](#)

- WRS News (for retirees) – May 2024:

What are RMDs? Know the Rules on Mandatory Withdrawals



The Internal Revenue Service (IRS) requires Wisconsin Deferred Compensation (WDC) Program participants to begin withdrawing money from pretax accounts at a certain age.

Such withdrawals only require withdrawing a portion of funds from the account each year. These are called "required minimum distributions" (RMDs).

Here are some things to keep in mind about RMDs.

Start date. The required beginning date for the first RMD for pretax accounts is April 1 following the year a person turns 73. The passage of SECURE 2.0 Act changed this age from 72 starting in 2023 and will further delay the age to 75 starting in 2033.

Pretax and Roth accounts differ. For WDC participants with both pretax and Roth options, RMD requirements after a certain age do not apply to the Roth portion. The latter requires RMDs only after the original account holder's death.

How much to take. The required minimum amount is based on the account balance at the end of the previous year divided by the applicable distribution period or an age-based life expectancy factor.

Penalty for not taking RMDs. The IRS penalty for not taking the full amount of an RMD is 25% of the amount not taken on time. If you correct this within two years, the penalty is reduced to 10%.

Inherited accounts under RMD. Rules require a beneficiary of a retirement account (including Roth option) to take distributions.

Spouse's age difference. When a spouse is the sole beneficiary of an inherited account, the RMD calculation will differ if the spouse is 10 or more years younger than the original account owner.

WDC offers an automated minimum distribution option for participants who are eligible for RMDs. Contact the WDC at 1-877-457-9327. ■



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Social Posts

- 21 topics provided with images
- Each topic included two options each for X and LinkedIn
- Example shown right:

WDC | 2024 SOCIAL POSTS (3041816)

Contribution limits

X 1: Going up? The contribution limits for 2024 have risen from \$22,500 to \$23,000. (<https://www.irs.gov/newsroom/401k-limit-increases-to-23000-for-2024-ira-limit-rises-to-7000>)

LinkedIn 1: Going up? The contribution limits for 2024 have risen from \$22,500 to \$23,000. What about age-50 and special catch-up contributions? You can find out about those, too. (<https://www.irs.gov/newsroom/401k-limit-increases-to-23000-for-2024-ira-limit-rises-to-7000>)

X 2: The IRS has bumped up the contribution limits from \$22,500 to \$23,000 to let everyone save a little more in 2024.

(<https://www.irs.gov/newsroom/401k-limit-increases-to-23000-for-2024-ira-limit-rises-to-7000>)

LinkedIn 2: The IRS has bumped up the contribution limits from \$22,500 to \$23,000 to let everyone save a little more in 2024. Learn about age-50 and special catch-up contribution limits, too. (<https://www.irs.gov/newsroom/401k-limit-increases-to-23000-for-2024-ira-limit-rises-to-7000>)



LINKEDIN | 1200x628



X | 1024x512



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Q2 WDC Communications

- Steppingstones Campaign
 - Email
 - Web banner
 - Social media post
 - Webinar
- Enrollment postcard
- DB Feed FAQ Flier and Things to Know (TTK) posting
- 2024 Participant Satisfaction Survey
 - Targeted emails (x2)
 - Web messaging
 - Social media post
- ETF Newsletter articles
- Fraud Prevention/Email Capture Campaign
 - Webinars
 - Email
 - Pre-login pop-ups
 - Self-send email
 - Social media post
 - ETF newsletter article




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Steppingstones Campaign

- Audience:
 - All participants with an email on file
- Tactics:
 - ETF GovDelivery email sent on 4/4
 - Empower email sent on 4/8 to 52,437 emails
 - Pre-login pop-up
- Empower email metrics:
 - Open rate: 55%
 - Click rate: 3%
- Results
 - 1,270 registered
 - 616 attended
 - 29 meetings scheduled



You are subscribed to a topic for the Wisconsin Department of Employee Trust Funds. This information has recently been updated and is now available.

Webinar: Your Steppingstones to Retirement

You're invited to attend the popular "Your Steppingstones to Retirement" webinar on November 15 from 9:00 a.m. to 12:00 p.m., CT. The webinar is hosted by representatives from the Department of Employee Trust Funds, the Social Security Administration, and the Wisconsin Deferred Compensation Program.

Learn how your Social Security, Wisconsin Retirement System pension, and deferred compensation savings account can bring you closer to a secure financial retirement. Don't miss this unique opportunity to review this important information!

[Register Now](#)

Topics include:

- Wisconsin Retirement System -- Eligibility and benefits; Core and Variable Trust Funds; annuity options; beneficiaries; and working in retirement
- Social Security -- Eligibility for retirement benefits; how early retirement affects your benefits; qualifying for survivors and spouse benefits; when to file for Medicare
- WDC Program -- WDC basics including contribution limits; investment options; pre-tax vs. Roth contributions; rollovers; and retirement readiness reviews

About the WDC

The [WDC Program \[links.gd\]](#) is an optional, supplemental retirement savings plan (IRS Section 457) for all working state and university employees. Local government and school district employees may also enroll if their employers offer it.

To learn more about the WDC Program, schedule a no-obligation appointment with a local WDC retirement plan advisor by calling 1-877-457-9327.

You're invited to attend "Your Steppingstones to Retirement", a free educational webinar created for Wisconsin Deferred Compensation Program (WDC) participants. Learn how your Social Security, Wisconsin Retirement System (WRS) pension, and WDC savings account bring you closer to a secure financial retirement. [Click here to register.](#)

[Dismiss](#)



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Wisconsin Deferred Compensation Program (WDC)



Your Steppingstones to Retirement

Hello Grace,

You're invited to attend "Your Steppingstones to Retirement," a free, educational webinar created for Wisconsin Deferred Compensation Program (WDC) participants.

Learn how your Social Security, Wisconsin Retirement System (WRS) pension, and WDC savings account bring you closer to a secure financial retirement. Don't miss this unique opportunity, hosted by representatives from the WDC, the Department of Employee Trust Funds, and the Social Security Administration

Click on the button below to sign up today!

[November 15th, 8 - 11 a.m. CT](#)

Questions? [Click here to schedule an appointment with your local WDC Retirement Plan Advisor](#) or visit [wdc457.org](#)¹

Enrollment Postcard

- Audience:
 - Eligible employees not currently enrolled ages 25-55 who have a vested balance
- Tactics:
 - Postcard sent on 4/24 to 84,863
- Results:
 - QR code scans: 92 (4/24-7/12)

WDC Helping You Turn Over a New Retirement Leaf

Are you facing a taxing situation?

Save through the Wisconsin Deferred Compensation Program (WDC)

The WDC is the state's supplemental retirement savings program available to all active state and UW employees as well as active local government and school district employees who work for a participating employer.

Enroll in the WDC and save automatically

Enrolling in the WDC is easy—your contributions are automatically deducted from your paycheck, so saving becomes routine.

Pay less in taxes today while saving more for tomorrow

Your contributions to the WDC are made with pre-tax dollars, which means every dollar you save may reduce your taxable income. And as you save on taxes, you may be able to save even more for your future to help maximize your retirement income. If applicable, you may even save with post-tax¹ dollars to reduce future taxable income during retirement.

Enroll now. Scan the QR code to learn more about enrollment in the WDC. See page two of the linked flier for the Plan Enrollment Code.

After you enroll, meet with a Retirement Plan Advisor

Once enrolled, you can schedule a complimentary meeting with a local WDC RPA to discuss topics that include:

- Your savings rate.
- Your retirement income needs.
- The investment options available to you.
- The amount or percentage of your pre-retirement income you may need to replace.

After you're enrolled, visit wdc457.org and click on the Owl image to schedule your complimentary meeting.

¹ Roth contributions under the WDC may be referred to as post-tax contributions and are still subject to annual contribution limits. Consider consulting a tax or financial professional before making post-tax contributions.

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Annual Participant Satisfaction Survey

- Audience:
 - All participants with an email on file
- Tactics:
 - ETF Active newsletter article
 - Website messaging live on 5/3
 - Email sent 5/7
 - Reminder email sent 5/28
 - Social media post
 - Field activity
- Email Metrics (below):
- Results (see pages 19-23)

WDC Participant Survey Take this quick survey and help improve your experience with the WDC Program. Responses are confidential. [Take WDC survey >](#)

How are we doing?

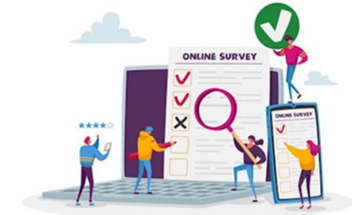
Take this quick survey and tell us what you think of the WDC.

[Start the survey now>>>](#)

[Dismiss](#)



Wisconsin Deferred Compensation Program (WDC)



We want your feedback on the Wisconsin Deferred Compensation Program!

Take this quick survey and help improve your Wisconsin Deferred Compensation Program.

Don't miss your chance! Tell us what you think about your Wisconsin Deferred Compensation Program before **Friday, May 31, 2024**.

[Click here to take the survey!](#)

Or cut and paste this link into your browser:

<https://www.surveymonkey.com/r/2024WDCSatisfactionSurvey> [surveymonkey.com]

Your confidential responses will help gauge customer satisfaction with the WDC.

Thank you for helping us improve your WDC Program!

Questions? Call the WDC at (877) 457-WDCP (9327).

Participant Survey Metrics	Original Email	Reminder Email
Survey email launch date	5/7/24	5/28/24
Emails delivered	8,095	8,087
Unique open rates	50%	51%
Click to open rates	3%	2%
Survey close date	5/29/24	
Number of survey responses	1,195	
Survey response rate	15%	



2024 Participant Survey Results

- Red percentages: decrease from 2023 survey
- Green percentages: increase from 2023 survey

Survey Emails	Open rate	Click rate
May 7 initial email	50% (-3%)	3% (+1%)
May 28 reminder email	52% (0%)	2% (0%)

Demographics	Answers
Age breakdown	
• Age 54 and under	• 34.29% (+10.19)
• Age 55-64	• 34.75% (+4.65%)
• Age 65+	• 30.96% (-14.74%)
How long have you had your WDC 457 account?	
• Less than 5 years	• 17.03% (+5.63%)
• 6 to 20 years	• 36.59% (+3.19%)
• 20+ years	• 46.38% (-8.82%)
What is your estimated account balance?	
• Less than \$10,000	• 9.32% (-1.02%)
• \$10,000 to \$50,000	• 16.34% (+7.24%)
• \$50,001 to 100,000	• 14.96% (-0.54%)
• More than \$100,000	• 59.38% (+5.28%)



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2024 Participant Survey Results

Questions	Answer
Do you have (or have you ever had) a WDC account?	<ul style="list-style-type: none"> 98.33% yes (-0.27%) 1.67% no (+0.37%)
How would you rate your satisfaction (4 or 5) with the WDC Board services below?	
<ul style="list-style-type: none"> Website resources 24/7 automated voice response system to commonly asked questions Customer services representative availability Local staff providing virtual support Quarterly statements and balance information Managed Account service, also called Empower Advisory Services or Online Advice or My Total Retirement 	<ul style="list-style-type: none"> 79.31% (+3.61%) 55.07% (-3.13%) 74.28% (+1.38%) 68.17% (+2.47%) 83.23% (+2.33%) 69.32% (+2.72%)
<p>66% (+0%) of respondents <u>were unfamiliar</u> with the automated voice response system, 28% (+0.13%) were unfamiliar with their customer service availability 52% (-2%) with the local staff providing virtual support, and 35% (+1%) with the Managed Account Services</p>	
Overall satisfaction (4 or 5) with services received from WDC/Empower	4 out of 5 satisfied (74.62%) (+0.92%)
How likely are you to recommend the WDC to a friend or colleague?	81.22% (+3.02%)

2024 Participant Survey Results

Questions

Answer

How do you like to get information from the WDC? (top 4)

- | | |
|------------------------|-------------------|
| • Email | • 76.90% (+1.8%) |
| • Website | • 59.68% (+7.98%) |
| • Quarterly statements | • 50.05% (-5.85%) |
| • Mail | • 34.44% (-6.46%) |

Topics of Interest (top 6)

- | | |
|--|-------------------|
| • Living in retirement | • 53.90% (-5.9%) |
| • Nearing retirement | • 34.33% (+8.33%) |
| • Fees charged | • 30.59% (+5.09%) |
| • Managed accounts | • 29.41% (+4.51%) |
| • Meeting with my local WDC representative | • 24.17% (+9.35%) |
| • Advanced investing | • 23.64% (+5.57%) |

Overall satisfaction (4 or 5) with quarterly statements:

- | | |
|-------------------------------------|-----------------|
| • Timeliness | • 81.0% (+6%) |
| • Accuracy | • 82.3% (+4%) |
| • Ease of reading and understanding | • 79.9% (+4.4%) |

2024 Participant Survey Results

Questions	Answer
Overall satisfaction (4 or 5) with the current investment options	<ul style="list-style-type: none"> 71.61% satisfied
Are you interested in more investment options in the WDC lineup?	<ul style="list-style-type: none"> No additional options desired: 63.55% Additional large cap: 17.17% Additional fixed account options: 14.72% Additional small cap options: 12.37%
Would you like to see another large cap growth fund in addition to the Fidelity Contrafund Commingled Fund?	<ul style="list-style-type: none"> 25.62% yes 10.90% no 63.48% don't know
Are you enrolled in the Managed Account service?	<ul style="list-style-type: none"> 33.26% yes 66.74% no
How did you hear about the Managed Account service?	<ul style="list-style-type: none"> From a WDC local RPA: 38.94% From a colleague: 15.51% From a marketing email: 14.19% Word of mouth: 7.59% None of the above: 30.69%
How likely are you to recommend the Managed Account service to others?	<ul style="list-style-type: none"> 71.43% would recommend



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2024 Participant Survey Results

Questions	Answer
Overall satisfaction (4 or 5) with the content of the WDC educational and communications materials?	• 64.26% (+2.46%)
Overall satisfaction (4 or 5) with wdc457.org:	• 77.15% (+5.25%)
• Information provided on the WDC website	• 80% (+4.5%)
• Ease of use of the WDC website	• 72.69% (+3.89%)
• Information and tools on the website	• 71.66 (+2.76%)
Overall satisfaction (4 or 5) with the WDC personalized experience, post log-in:	• 75.89% (+6.92%)
• Ease of linking accounts	• 70.12% (+5.58%)
• Ability to access and make changes to account	• 72.97% (+3.83%)
• Use of financial tools	• 69.08% (+3.34%)
On a scale of 1 to 10, would you recommend the WDC to a friend/colleague?	8.3 out of 10 (= Net Promotor Score* of 45)

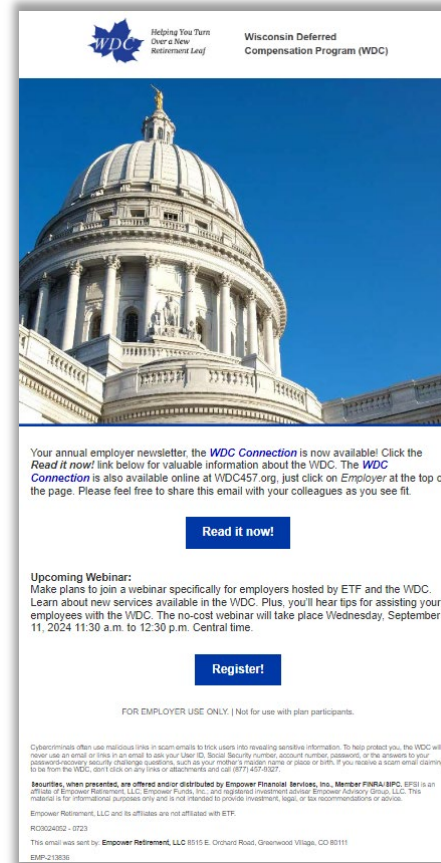
*Net Promoter Score (NPS) measures customer experience. According to Bain & Co., the creator of the NPS, NPS above 20 is considered favorable, above 50 is excellent, and above 70 is world-class.



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Employer Newsletter

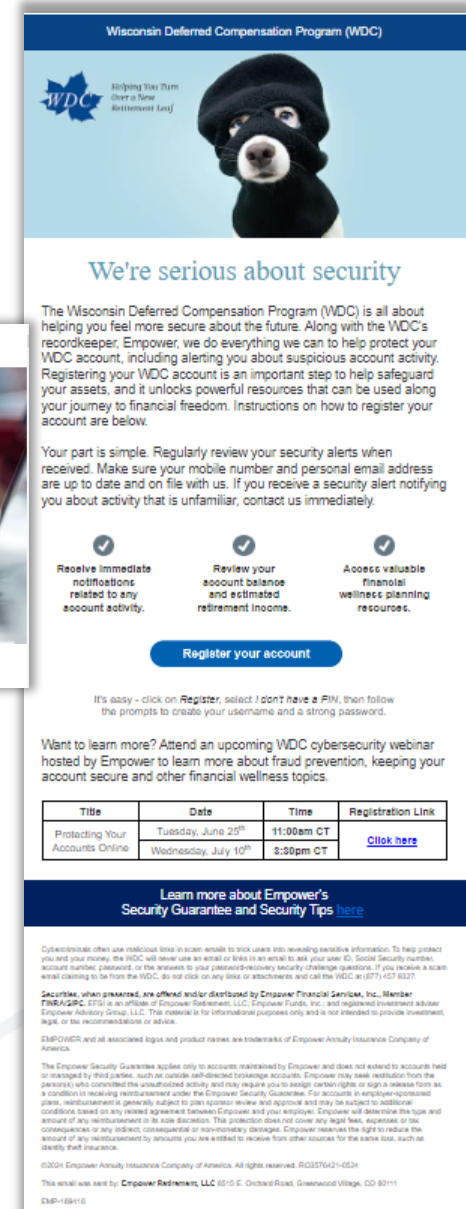
- Audience:
 - All participating employers
- Tactics:
 - Email sent 6/25
- Email Metrics:
 - Email sent to 1,604 employer contacts
 - Open rate: 39%
 - Click rate: 27%
- Results:
 - 66 RPA meetings were scheduled 6/25-7/25
 - 93 Employer webinar registrations
 - 6 Steppingstones registrations



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Fraud Prevent/Email Capture Campaign

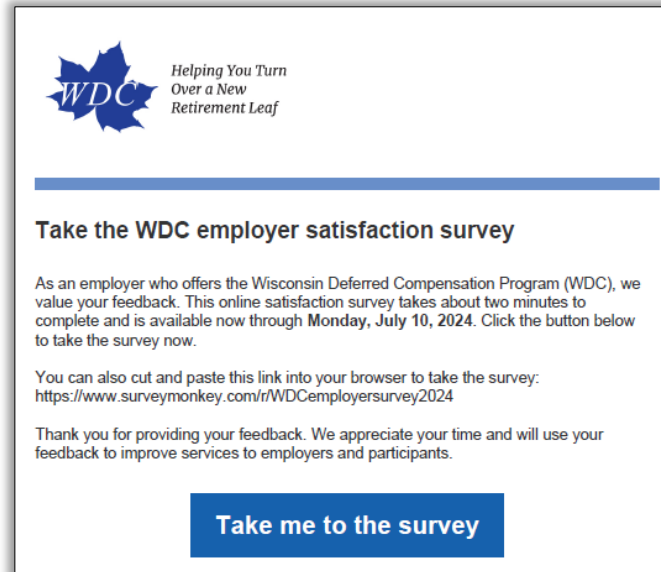
- Audience:
 - Active and terminated participants with a balance
- Tactics:
 - Webinars 6/25 and 7/10
 - Email sent 6/13
 - Pre-login pop-ups (2)
 - Self-send email
 - Social media post
 - ETF newsletter article (Sept newsletters)
- Email metrics:
 - Email sent to 54,634 active and terminated participants with a balance
 - Open rate: 58%
 - Click rate: 4%
- Results:
 - 729 account registrations took place between 6/13 and 7/26



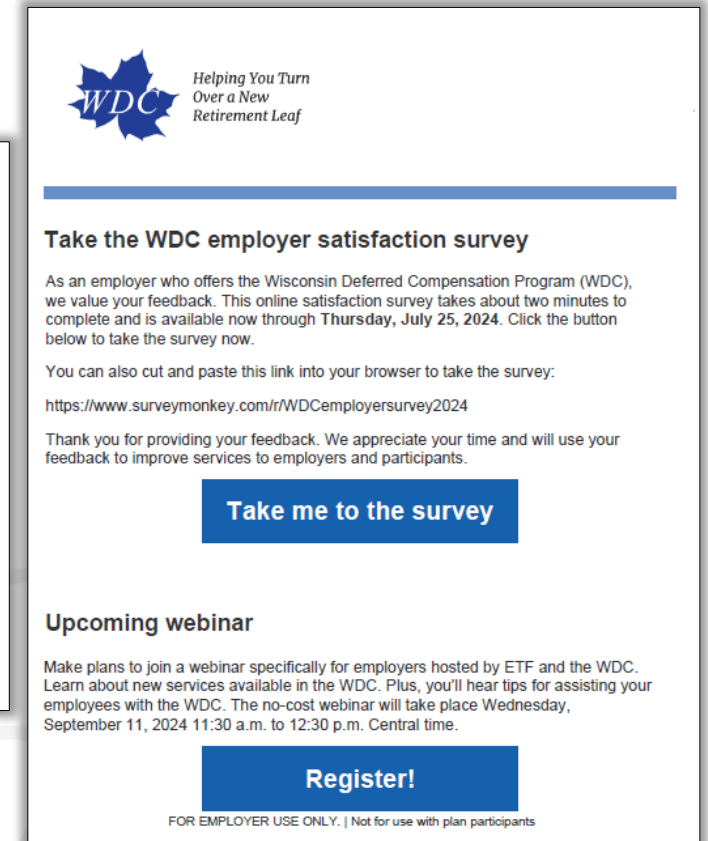
Helping You Turn
Over a New
Retirement Leaf

Annual Employer Survey

- Audience:
 - All participating employers
- Tactics:
 - Emails sent 6/11, 7/18
 - Employer newsletter
- Survey Response:
 - 141, 8%
- Email metrics:
 - Sent to 1,603 employer contacts
 - 6/11 Email
 - Open rate: 29%
 - Click rate: 18%
 - 7/18 Email
 - Open rate: 31%
 - Click rate: 21%
- Results:
 - See page 27



The screenshot shows an email header with the WDC logo and tagline "Helping You Turn Over a New Retirement Leaf". Below the header is a blue horizontal line, followed by the heading "Take the WDC employer satisfaction survey". The main body of the email contains a paragraph explaining the survey's purpose and availability through Monday, July 10, 2024. It includes a link to the survey and a "Take me to the survey" button. A thank-you message is also present at the bottom.



The screenshot shows a webpage with the WDC logo and tagline "Helping You Turn Over a New Retirement Leaf". Below the logo is a blue horizontal line, followed by the heading "Take the WDC employer satisfaction survey". The main body of the page contains a paragraph explaining the survey's purpose and availability through Thursday, July 25, 2024. It includes a link to the survey and a "Take me to the survey" button. Below this is a section for an "Upcoming webinar" with a "Register!" button. At the bottom, there is a note: "FOR EMPLOYER USE ONLY. | Not for use with plan participants".



2024 Employer Survey Results

Question	Satisfied or Very Satisfied
Overall, how satisfied are you with the Wisconsin Deferred Compensation (WDC) Program?	85%
Have you hosted/promoted your local WDC Retirement Plan Advisor for group or individual meetings virtually with your employees in the last 12 months?	44% Yes; 57% No
How satisfied were you and your employees with the group/or individual meetings with your local WDC Retirement Plan Advisor?	80%
How likely are you to offer virtual meetings (by phone and/or videoconference) for your employees in the future?	52%
Have you worked with the WDC's Madison office in the last 12 months?	29% Yes; 71% No
How satisfied were you with the WDC's Madison office?	83%
Have you contacted Plan Technical Support for assistance with the Plan Service Center (PSC) employer website in the last 12 months?	9% Yes; 91% No
How satisfied were you with your Plan Technical Support experience?	92%
Have you had payroll errors that needed to be corrected in the last 12 months?	7% Yes; 93% No
How satisfied were you with the help you received from the WDC regarding the payroll error?	90%
How do you promote the WDC to your employees? Select all that apply.	60% Email; 69% In-person; 18% Intranet; 17% Webinars
How likely are you to recommend the WDC to a friend or colleague?	6.3 out of 10 (= Net Promotor Score of 43)



Helping You Turn
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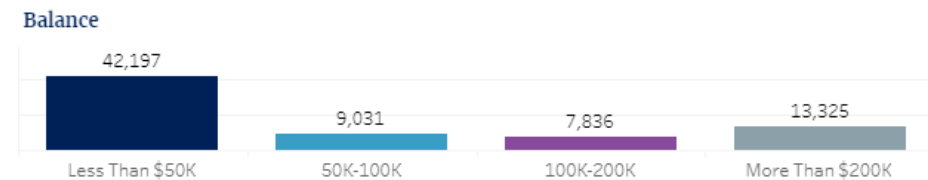
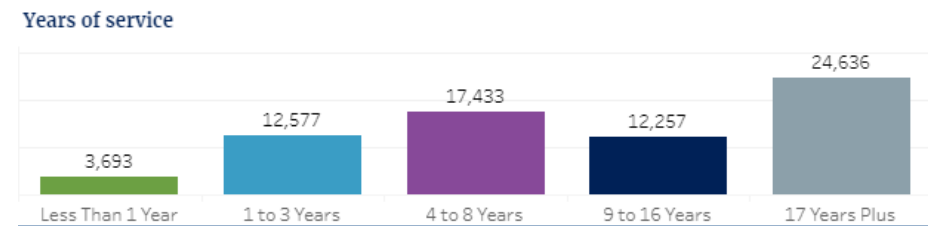
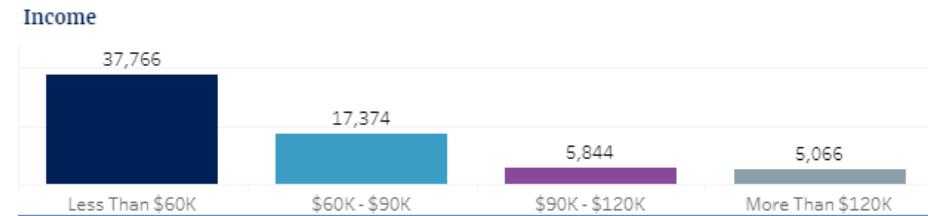
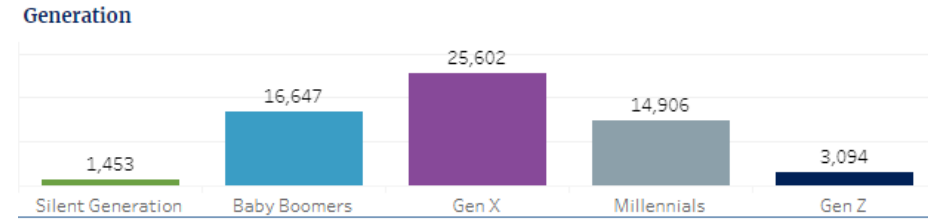
Empower Communications Engine (ECE) Results

Total unique individuals who received a message: 61,584

Engagement and Response Metrics*	
Unique Email Open Rate	51.85%
Unique Email Click Rate	2.85%
Inbound Call %	1.00%
Login %	23.67%
Primary Response Rate	1.15%
Secondary Response Rate	0.03%
PLA Click Rate	0.97%

*YTD through 6/29/24

Unique Customers That Received Messages By Demographic



Helping You Turn
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