



2025 Strategic Partnership Plan Update

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2025 WDC Strategic Partnership Plan



Helping You Turn
Over a New
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
- Pre-login pop-up
- Social media post (new link)
- Webinar

Secure 2.0 and Operational Communications

Goal: Educate participants on Secure 2.0 updates that affect the WDC, along with plan document and fee changes

Audience: Active and terminated participants with a balance

Tactics:

- Email
- News and Updates blurbs
- Statement stuffer/flyer
- Statement narrative
- Custom ETF newsletter article
- Library of material updates
- Social media post

At Risk Retiree Campaign

Goal: Encourage at risk retirees to meet with their local WDC rep for a no-cost RRR and promote financial wellness

Audience: At risk retirees

Tactics:

- Email
- Webinar
- Web messaging
- Custom ETF newsletter article
- Social media post (with gif)

Enrollment Campaign/National Retirement Security Month

Goal: Encourage enrollment in the WDC/Promote open enrollment webinars

Audience: Those not enrolled in the WDC

Tactics:

- Self-send enrollment email
- Social media posts (with gif) / geofencing
- Web banner
- Custom ETF newsletter article
- Webinars
- Recorded Brainshark/presentation

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
- *NEW:* Account registration
- *NEW:* Beneficiary pop-up
- *COMING SOON:* Financial Wellness tools

Communication updates:

- ETF educational newsletter articles
- 2025 limit updates

Communication updates:

- ETF educational newsletter articles
- 2025 Annual Participant Satisfaction Survey
 - Targeted emails (x2)
 - Web messaging

Communication updates:

- ETF educational newsletter articles

Ongoing Employer communications:

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

Ongoing activities:

1. Retirement Readiness Reviews with Retirement Plan Advisors (RPAs) including Best Interest Profile advice experience
2. Bi-weekly New Employee Orientation (NEO) webinars hosted by RPAs for non-participating employees
3. Ongoing Library of Material review

4. News and Updates articles (if applicable, 3-5)
5. Indicative data capture

2025 Communications Summary



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Audience	Activity	Objective	Communications Tactics	Results as of July 31, 2025
All participants	SECURE 2.0/Operational Changes	Educate participants on the exciting changes coming to the WDC in 2025 as a result of SECURE 2.0, plan document and fee changes	Email, News & Updates articles, statement stuffer/flyer, statement narrative, custom ETF newsletter article, updates to library of materials, social media post	See page 7
All participants	Automated communications via the Empower Communications Engine (ECE) and The Currency™	Various	Emails, web messaging, outbound calling, text messages	Ongoing
All participants	Call center and RPA surveys (Net Promotor Score, NPS)	Measure participant satisfaction with customer care center and field staff	Daily surveys	Call Center: 4.54 out of 5 QTD Field staff NPS: 85
All participants and employers	News & Updates articles (3-5 as needed)	Keep participants up-to-date with the WDC	News & Updates articles	See page 7
Employers	Employer mini-newsletter (3x/year)	Keep employers up-to-date on WDC and provide latest enrollment code to share with employees	Email (3x/year)	See page 9 & 21
New hires, mid-career and pre-retiree participants	Steppingstones	Educate participants on how SSA, WRS and WDC fit together in their retirement picture	Email, pre-login pop-up, social media post, webinar	See page 10
Non-participating employees and participants	ETF newsletter support (Active & Retiree versions)	Various	Custom articles, The Currency™, links to News & Updates and other WDC resources	Ongoing
Non-participating employees and participants	New Employee Orientation (NEO) webinars → “How to Enroll” effective Q4	Enroll non-participating employees in WDC	Recurring webinars promoted via employer communications	14 NEO webinars 219 registrants; 149 attendees (68%)

2025 Communications Summary



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Audience	Activity	Objective	Communications Tactics	Results as of July 31, 2025
At-risk termed over 58	At-Risk Retiree Campaign	Educate participants on the benefits of staying in the plan including advice	Email, new webinar, web messaging (pre and post log-in), custom ETF newsletter article, social media post w/ gif	Launched 7/29
Employers	Employer newsletter Employer webinars Employer survey	Engage employers	Email, newsletter, webinar, survey	Sept 2025 launch
Non-participating employees and participants	National Retirement Security Month (NRSM) Enrollment Campaign	Encourage enrollment in the WDC and promote webinars	Self-send enrollment email, social media posts w/ gif, geofencing, web banner, custom ETF newsletter article, webinars, recorded enrollment presentation	Oct 6-31, 2025
New hires, mid-career and pre-retiree participants	Steppingstones to Retirement	Educate participants on how SSA, WRS and WDC fit together in their retirement picture	Email, pre-login pop-up, social media post, webinar	Nov 4, 2025

2025 Field Activity



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As of 7/31/25	WDC Goal	Actual	% to goal
Group meetings	300	161	54%
Retirement Readiness Reviews (RRRs)	2,700	1,584	59%
New employers	10	5	50%
In-force accounts	1.5	0.08%	0.05%
Convention(s)	1	WMCA Aug 19-21, LaCrosse	100%
Individual meetings		771	
Enrollment meetings		863	
Positive actions taken		2,445	
Diversifications (#/\$)		341 / \$63.8M	
Personalizations (#/\$)		658 / \$91.9M	
Deferral Increases (#/\$)		483 / \$1.4M	(average \$3,050/yr)

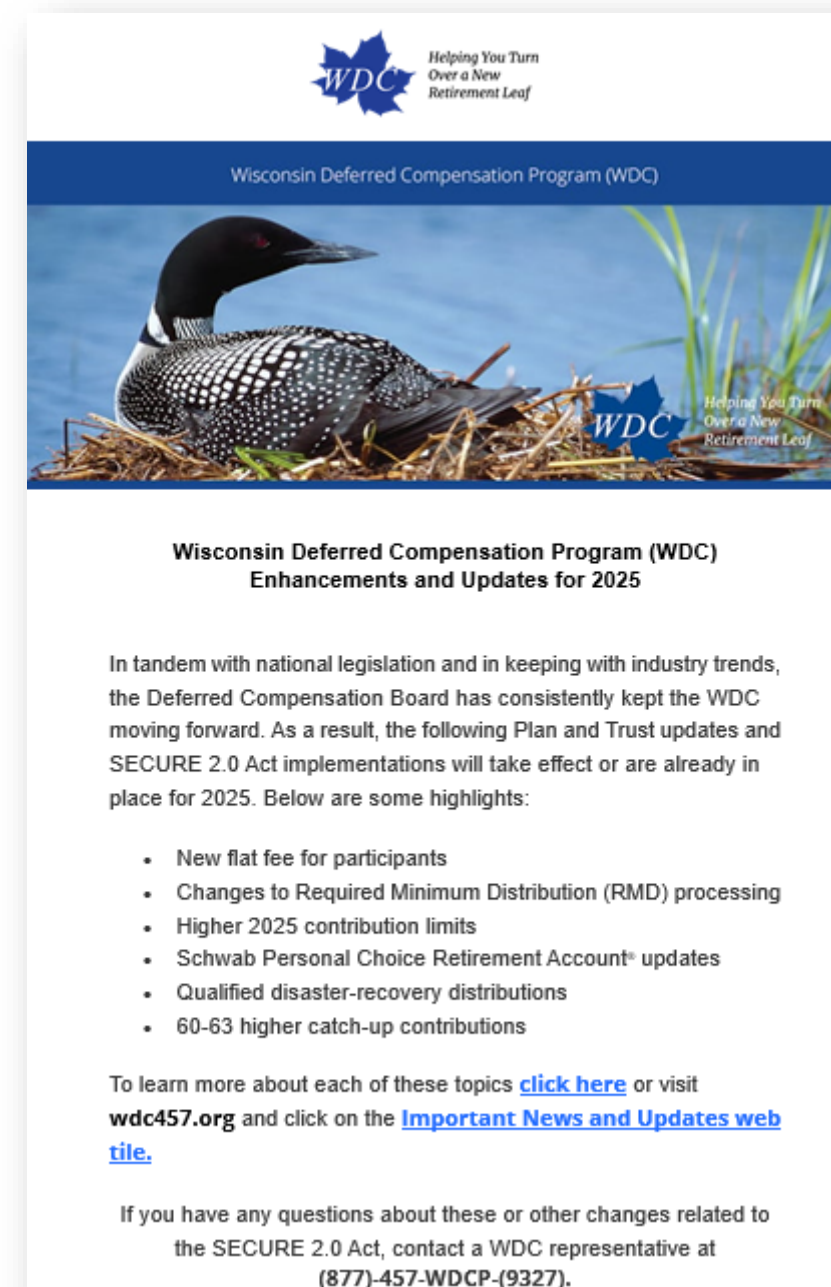
Source: Empower field activity data, 7/31/25

Q1 Communications

- Annual and SECURE 2.0 collateral updates
- SECURE 2.0 and Operational Communications
- News and Updates articles:
 - New Flat Fee article
 - Plan and Trust Document Changes article
 - SECURE 2.0 Implementations article
- Employer mini-newsletter
- Steppingstones Campaign
- ETF Newsletter articles

SECURE 2.0 and Operational Communications

- Audience:
All participants
- Tactics:
 - Custom ETF newsletter article
 - Empower email sent on 1/23 to 52,647 emails
 - Statement stuffer
 - Social media post
 - Statement Narrative
- Results:
 - Open rate: 65% (avg 53%)
 - Click rate: 7% (avg 2.4%)



In tandem with national legislation and in keeping with industry trends, the Deferred Compensation Board has consistently kept the WDC moving forward. As a result, there are numerous Plan and Trust updates and SECURE 2.0 implementations that will be taking effect in 2025. Please see the attached statement stuffer for more information or visit wdc457.org and click on the "News and Updates" tile.



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News & Updates Articles

- News and Update articles:
 - New Flat Fee
 - Plan and Trust Document Changes
 - SECURE 2.0 Implementations

[▶ New Flat Fee starting in 2025](#)

December 12, 2024

Moving to a flat participant fee: Effective January 1, 2025, participant administrative fees for the Wisconsin Deferred Compensation Program (WDC) will move to a flat fee. These fees cover the cost of WDC recordkeeping and related plan services. The Board approved a monthly administrative fee of \$3.90/month for all WDC participant accounts with a balance greater than \$5,000. This fee totals \$46.80 per year.

ACCOUNT BALANCE	MONTHLY FEE	ANNUAL FEE
\$0 to \$5000	\$0	\$0
\$5001 and over	\$3.90	\$46.80

Questions? Visit wdc457.org or call (877) 457-WDCP (9327).

[▶ Plan and Trust Document Changes Effective January 1, 2025](#)

December 12, 2024

As of January 1, 2025, there is an updated Plan and Trust document. [Click here](#) for more details.

[▶ SECURE 2.0 Implementations in 2025](#)

December 12, 2024

In tandem with national legislation and in keeping with industry trends, the Deferred Compensation Board has consistently kept the WDC moving forward. As a result, the following Plan and Trust updates and SECURE 2.0 Act implementations will take effect or are already in place for 2025. [Click here](#) to learn more.



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Employer mini-newsletter 1 of 3

- Audience:
 - All participating employers
- Tactics:
 - Email sent on 2/3
- Email Metrics:
 - 1,652 emails sent
 - Open rate: 48% (avg 53%)
 - Click rate: 17% (avg 2.4%)

Average enrollments were 841 per quarter 2021-2022. We started the employer mini-newsletter 2x/year in 2023, and enrollments have averaged 953 per quarter - a 13% increase. Per Empower plan data as of 4/14/25.



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Exciting changes in 2025!

In tandem with national legislation and in keeping with industry trends, the Deferred Compensation Board has consistently kept the WDC moving forward. As a result, the following Plan and Trust updates and SECURE 2.0 Act implementations will take effect or are already in place for 2025. Below are some highlights:

- New flat fee for participants
- Changes to Required Minimum Distribution (RMD) processing
- Higher 2025 contribution limits
- Schwab Personal Choice Retirement Account® updates
- Qualified disaster recovery distributions
- 60-63 higher catch-up contributions

To learn more about each of these topics click here or visit wdc457.org and click on the Important News and Updates web tile.

2/1/25 Plan Enrollment Code Available:

Employees can enroll in the Wisconsin Deferred Compensation Program (WDC) at any time using the plan enrollment code (PEC) included in the [Benefits of Enrolling Flyer](#) or by calling the WDC at (877) 457-WDCP (9327). This code can be found in the Plan Service Center (PSC) under *Participants then Employee Forms then Plan Enrollment Code*. The PEC is updated on the day of expiration, not before, and is a necessary security feature.

Enrollment Forms:

If you have a new employee who already has a WDC account, they will need to complete a paper enrollment form to establish a WDC account with you. The form can be found in the PSC under *Participants then Employee Forms* and should be returned via upload or mail.

New hires? Send them to the WDC's New Employee Orientation (NEO):

The WDC offers New Employee Orientation (NEO) webinars. New employees or anyone who wants to enroll in the WDC can join a WDC Retirement Plan Advisor who will provide a brief overview of the WDC and walk attendees step by step through enrollment.

Please share this webinar schedule with your employees who can select the date and time that works best for them. They will be directed to Microsoft Teams to register and reserve their spot.

2025 Contribution Limits

In November, the Internal Revenue Service (IRS) announced the cost-of-living adjustments to retirement plan contributions for tax year 2025. Visit the [News & Updates](#) page of the WDC website at wdc457.org for this and all other plan updates.

Learning Opportunities for Staff

The Currency

Employees can sign up for the weekly edition of Empower's *The Currency* newsletter sent to their inbox at empower.com/newsletter. They will receive the latest financial headlines, trends, and insights to help them feel more confident making money moves in life, work, and play.

Educational Webinars

Whether you have new employees, mid-career staff, or some close to retirement, WDC webinars have something to offer everyone. Be sure to share [this flyer](#) with your staff. All staff, including those who are not enrolled in the WDC, can benefit from the topics in this year's webinars.

And back by popular demand: "Your Steppingstones to Retirement" webinar is set for March 20th at 12 pm. Let your employees know to register by sharing [this link](#).

Advice for WDC Participants

WDC Retirement Plan Advisors (RPA) are working under a hybrid model. If you would like to schedule a WDC presentation and/or in person meetings at your location contact the WDC's office in Madison at WDC_Office@empower.com.

Our advisors can look at an individual's full financial picture and give them advice to help them achieve the outcomes they want over time. Employees can access our investment professionals to get the advice and confidence they need, and they can include their spouse or partner.

WDC participants can schedule an in-person or virtual appointment¹ at any time by clicking [here](#) or going to the WDC website at wdc457.org and clicking on the Schedule a Meeting owl picture.

In-person meetings are also available at the WDC Madison office on the far east side of Madison. Participants can click [here](#) to schedule a meeting if they plan to be in the area.

For Plan Sponsor Only

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¹The Retirement Readiness Review is provided by an Empower representative registered with Empower Financial Services, Inc. and may provide tailored retirement education and guidance at no additional cost to participants.

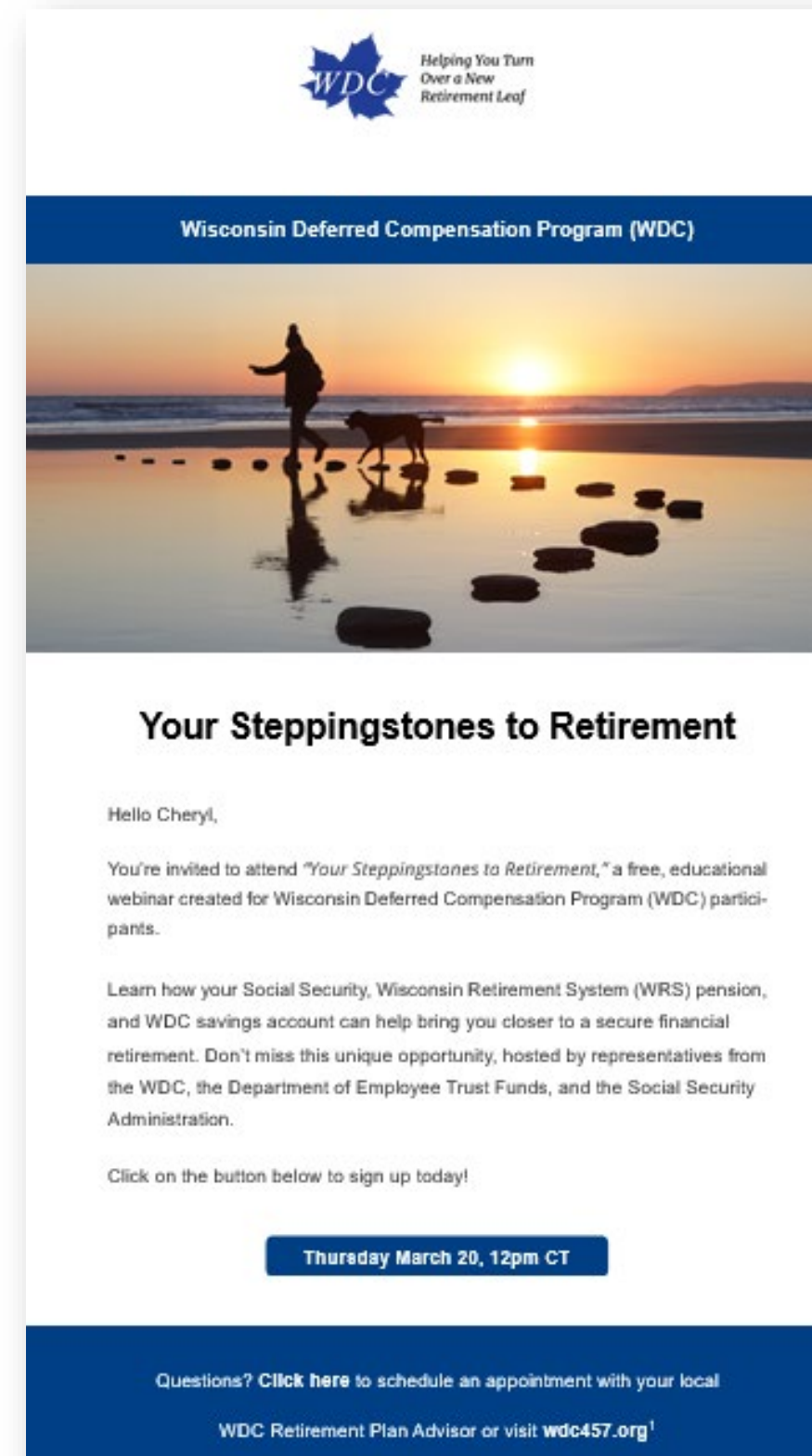
Cybercriminals often use malicious links in scam emails to trick users into revealing sensitive information. To help protect you, the WDC will never use an email or link in an email to ask your User ID, Social Security number, account number, password, or the answer to your password recovery security challenge questions, such as your mother's maiden name or place of birth. If you receive a scam email claiming to be from the WDC, do not click on any links or attachments and call (877) 457-4027.

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GPH457R-WFS18053-0520-004302393-0125

This email was sent by: Empower Retirement, LLC, 8510 E. Orchard Road, Greenwood Village, CO 80111
DUP-202388


Steppingstones Campaign

- Audience:
 - All participants with an email on file
- Tactics:
 - Empower email sent on 3/7 to 52,437 emails
 - Pre-login pop-up at wdc457.org
 - ETF GovDelivery email sent on 3/11
- Empower email Metrics:
 - Open rate: 60% (avg 53%)
 - Click rate: 5% (avg 2.4%)
- Results
 - 947 registered
 - 580 attended, 61%
 - Clicks for individual meetings: 80



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](#)



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](#) 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.



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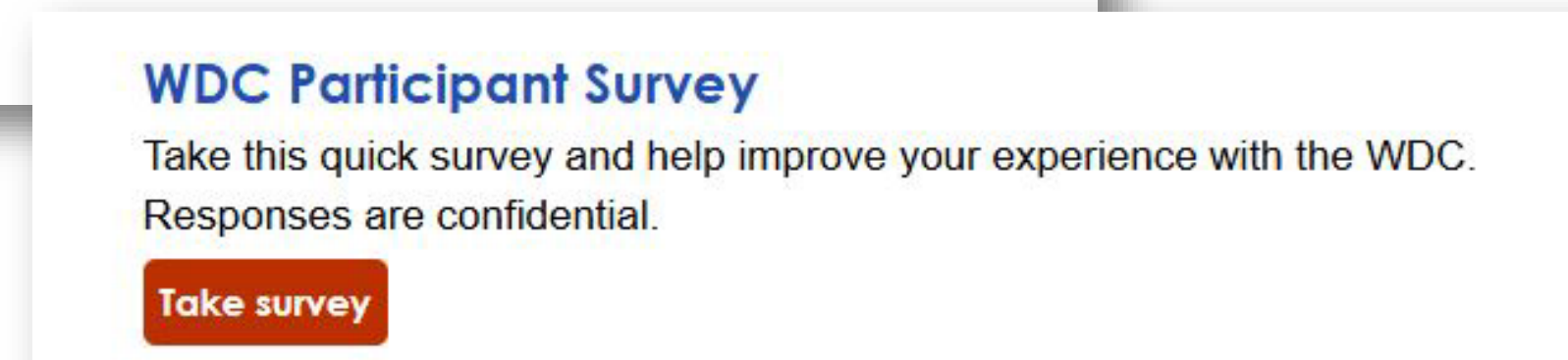
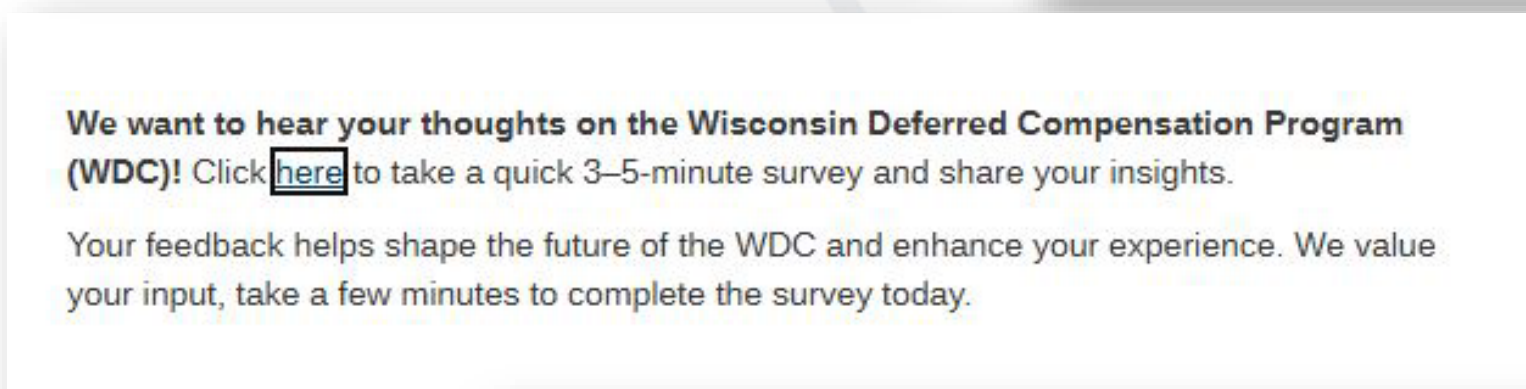
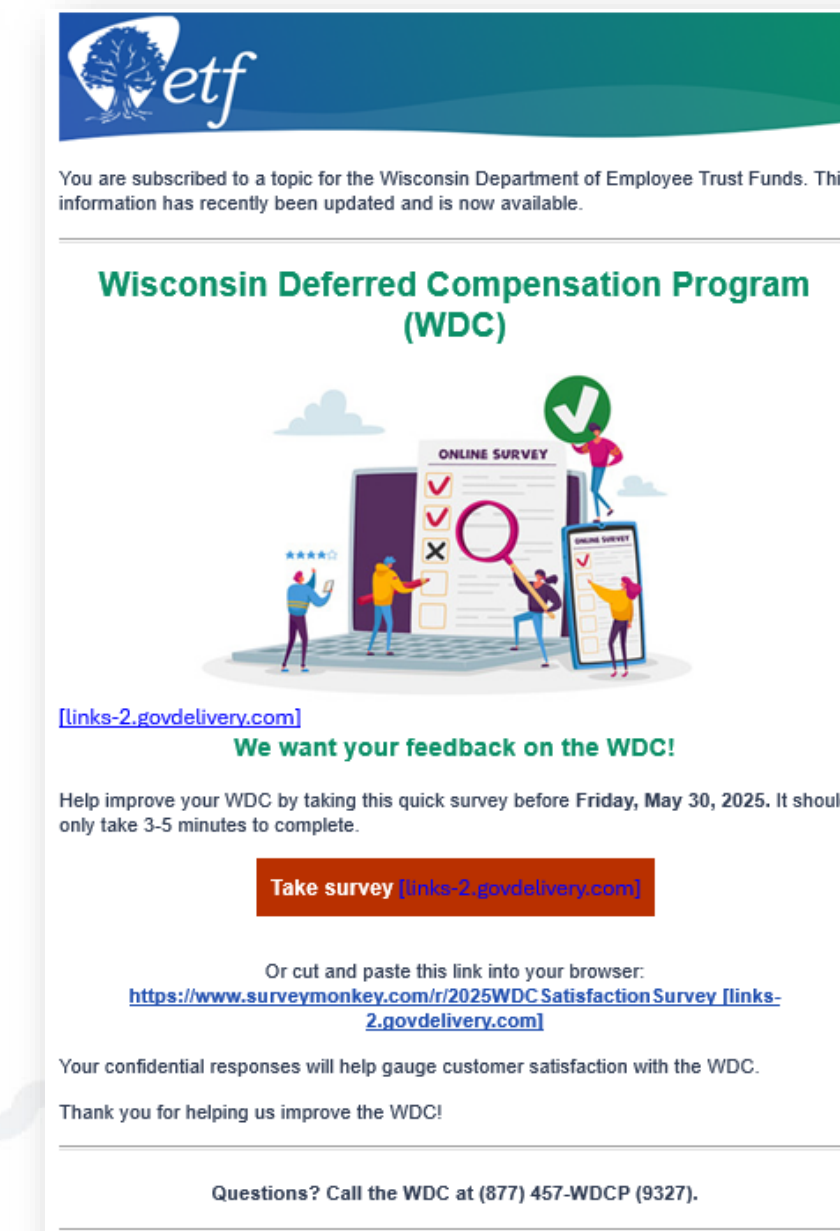
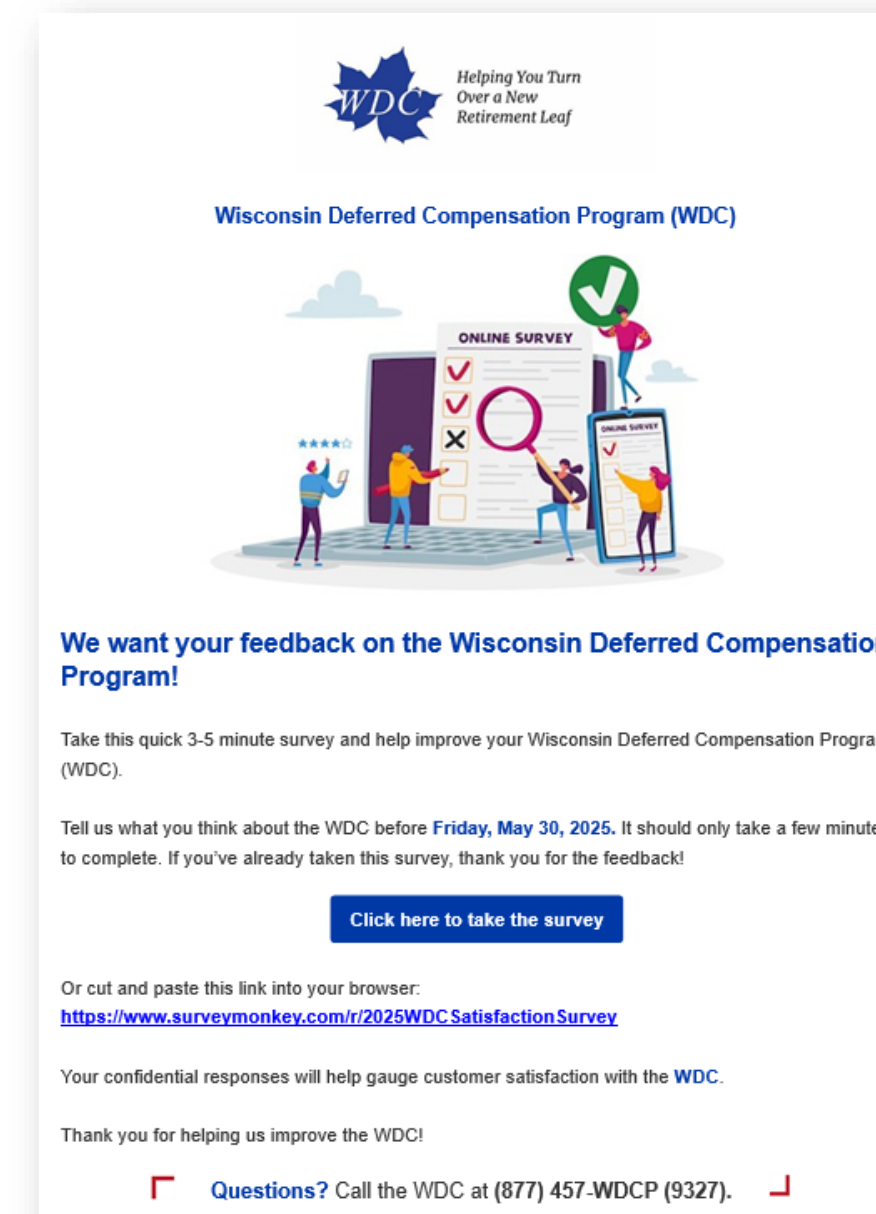
Q2 Communications

- 2025 Participant Satisfaction Survey
 - Email
 - Reminder email
 - Pre-login pop up
 - Post login plan message
 - ETF Govt Delivery email
 - Results
- Updated enrollment video
- New webinar website tile
- Employer mini-newsletter
- ETF newsletter articles

Annual Participant Satisfaction Survey

- Audience:
 - All participants with an email on file
- Tactics:
 - Email sent on 4/29
 - Reminder email sent on 5/20
 - Post-login plan message on 4/25
 - Pre-login pop-up on 4/25
 - ETF Govt Delivery Email sent on 5/1

Participant Survey Metrics	Original Email (Targeted audience)	Reminder Email (Not targeted)
Survey email launch date	4/29/25	5/20/25
Emails delivered	9,958	35,738
Unique open rates	59% (avg 53%)	58% (avg 53%)
Click to open rates	3% (avg 2.4%)	3% (avg 2.4%)
Survey close date	5/30/25	
Number of survey responses	1,771	
Survey response rate	4.95%	



2025 Participant Survey Results

- Red percentages: decrease from 2024 survey
- Green percentages: increase from 2024 survey

Survey Emails	Open rate	Click rate
April 29 initial email	59% (+7%)	3% (0%)
May 20 reminder email	52% (+6%)	2% (+1%)
Demographics	Answers	
Age breakdown		
• Age 54 and under	• 48.53% (+14.24%)	
• Age 55-64	• 32.51% (-2.24%)	
• Age 65+	• 18.96% (-11%)	
How long have you had your WDC 457 account?		
• Less than 5 years	• 26.07% (+9.04%)	
• 6 to 20 years	• 42.51% (+5.92%)	
• 20+ years	• 31.42% (-10.96%)	
What is your estimated account balance?		
• Less than \$10,000	• 16.63% (+7.31%)	
• \$10,000 to \$50,000	• 23.68% (+7.34%)	
• \$50,001 to 100,000	• 17.52% (+2.56%)	
• More than \$100,000	• 42.16% (-17.22%)	
Do you have (or have you ever had) a WDC account?		
	• 89.67% yes (-8.66%)	
	• 10.33% no (+8.66%)	

2025 Participant Survey Results

Questions	Answer
How would you rate your satisfaction (4 or 5) with the WDC Board services below?	
• Website resources	• 75.28% (-4.03%)
• 24/7 automated voice response system to commonly asked questions	• 55.98% (+0.91%)
• Customer services representative availability	• 71.75% (-2.53%)
• Local staff providing virtual support	• 64.34% (-3.83%)
• Quarterly statements and balance information	• 79.54% (-3.69%)
• Managed Account service, also called Empower Advisory Services or Online Advice or My Total Retirement	• 67.74% (-1.58%)
<i>7% (+3) of respondents were <u>unfamiliar</u> with the website resources, 70% (+4%) were unfamiliar with the automated voice response system, 37% (+9%) were unfamiliar with their customer service availability, 56% (+4%) with the local staff providing virtual support, 4% (+0) with quarterly statements and balance, and 42% (+7%) with the Managed Account Services</i>	
Have you met with a local, salaried WDC Retirement Plan Advisor (RPA)?	• 32.99% yes • 67.01% no
How would you rate your satisfaction (4 or 5) with your local WDC RPA?	• 77.14%
Have you visited the WDC website at wdc457.org	• 90.00% yes • 10.00% no

2025 Participant Survey Results

Questions	Answer
Overall satisfaction (4 or 5) with wdc457.org: <ul style="list-style-type: none">• Information provided on the WDC website• Ease of use of the WDC website• Information and tools on the website	<ul style="list-style-type: none">• 76.97% (-0.18%)• 78.59% (-1.41%)• 73.13% (+0.44%)• 73.14% (+1.48%)
Overall satisfaction (4 or 5) with the WDC personalized experience, post log-in: <ul style="list-style-type: none">• Ease of linking accounts• Ability to access and make changes to account• Use of financial tools	<ul style="list-style-type: none">• 75.89% (-4.24%)• 65.59% (-4.53%)• 73.20% (+0.23%)• 64.14% (-4.94%)
Overall satisfaction (4 or 5) with the content of the WDC educational and communications materials?	<ul style="list-style-type: none">• 59.85% (-4.41%)
Overall satisfaction (4 or 5) with quarterly statements: <ul style="list-style-type: none">• Timeliness• Accuracy• Ease of reading and understanding	<ul style="list-style-type: none">• 78.82% (-2.18%)• 84.84% (+2.54%)• 78.10% (-1.80%)
Overall satisfaction (4 or 5) with the WDC Program	4 out of 5 satisfied (77.66%) (+3.04%)

2025 Participant Survey Results

Questions	Answer
Overall satisfaction (4 or 5) with Empower, the WDC's recordkeeper	• 68.56%
How likely are you to recommend the WDC to a friend or colleague?	• 79.37% (-1.85%)
How do you like to get information from the WDC? (top 4) <ul style="list-style-type: none">• Email• Website• Quarterly statements• Mail	<ul style="list-style-type: none">• 79.83% (+2.93%)• 56.72% (-2.96%)• 56.57% (+6.52%)• 40.03% (+5.59%)
Have you attended a WDC virtual webinar?	<ul style="list-style-type: none">• 30.19% yes• 69.81% no
Why haven't you attended a virtual webinar? <ul style="list-style-type: none">• I wasn't aware webinars were offered.• I'm not interested in the topics being presented.• The time of the webinar conflicted with my work schedule	<ul style="list-style-type: none">• 38.04%• 28.13%• 33.83%

2025 Participant Survey Results

Questions	Answer
Topics of Interest (top 5)	
• Living in retirement	• 56.26% (+2.36%)
• Nearing retirement	• 52.73% (+18.40%)
• Managed accounts	• 39.65% (+10.24%)
• Advanced investing	• 31.94% (+8.30%)
• Fees charged	• 31.78% (+1.19%)
Do you like receiving the latest financial news via The Currency?	<ul style="list-style-type: none"> • 29.86% yes • 6.12% no • 64.02% have not read The Currency
Are you enrolled in the Managed Account service?	<ul style="list-style-type: none"> • 27.82% yes (-4.44%) • 72.18% no (+5.44%)
How did you hear about the Managed Account service?	
• From a WDC local RPA	• 42.39% (+3.45%)
• From a colleague	• 12.24% (-3.27%)
• From a marketing email	• 15.82% (+1.63%)
• Word of mouth	• 5.67% (-1.92%)
• None of the above	• 0.00% (-30.69%)
How likely are you to recommend the Managed Account service to others?	• 68.28% would recommend (-3.28%)

2025 Participant Survey Results

Questions	Answer
How knowledgeable are you with investments? <ul style="list-style-type: none">• Very unfamiliar• Somewhat unfamiliar• Neutral• Somewhat knowledgeable• Very knowledgeable	<ul style="list-style-type: none">• 10.28%• 13.93%• 35.09%• 28.21%• 12.49%
Overall satisfaction (4 or 5) with the WDC investment options	<ul style="list-style-type: none">• 64.66% satisfied (-6.95%)
Are you interested in more investment options in the WDC lineup? <ul style="list-style-type: none">• No additional options desired• Additional large cap• Additional fixed account options• Additional small cap options• Additional international options	<ul style="list-style-type: none">• 56.23% (-7.32%)• 18.24% (+1.07%)• 18.41% (+3.69)• 14.42% (+2.05%)• 15.69% (+5.10%)



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Updated Enrollment Video

- Audience:
 - All participants
- Tactics:
 - Video posted on wdc457.org/Enroll Now webpage

The screenshot shows the 'Enroll now' section of the WDC website. It includes a PDF link for 'The Benefits of Enrolling in the Wisconsin Defined Contribution Program (WDC)', a text block explaining the enrollment process, and a list of features: Beneficiary designation, Contributions, and Account Profile. A 'WATCH THE VIDEO' button is highlighted with a red box. A red arrow points from this button to a video player overlay. The video player shows the WDC logo and the text 'Helping You Turn Over a New Retirement Leaf'. The video player interface includes a play button, a progress bar at 1:01, and standard video controls.

Enroll now

It's never too early to plan for retirement. To view the Benefits of Enrolling, click the flier on the left to learn more about the WDC and to access your Plan Enrollment Code.

Ready to enroll?

ENROLL NOW

You will need your Plan Enrollment Code (PEC), located on the backside of the Benefits of Enrolling flier, or provided by your employer, to enroll. Click the "Enroll Now" button, click "I have a plan enrollment code" and enter your Group ID, PEC and Employer Name. You can also receive your PEC by calling the WDC at (877) 457-WDCP (9327).

- ▶ **Beneficiary designation:** The WDC allows you to designate or change your beneficiary online. [Click here to log in](#) and you will be taken directly to your My Beneficiaries page.
- ▶ **Contributions:** The WDC allows you to designate or change your contribution amount online. [Click here to log in](#). You will be taken directly to your contributions page, where you can use the Contribution Rate slider.
- ▶ **Account Profile:** Ensure you have provided a valid and active email account so that you are provided important updates and receive any correspondence from Empower, including your quarterly statements.

Reasons to enroll

See how participating in the WDC can be a great way to get closer to your financial goals for the future.

WATCH THE VIDEO

Reasons to enroll

WDC Helping You Turn Over a New Retirement Leaf

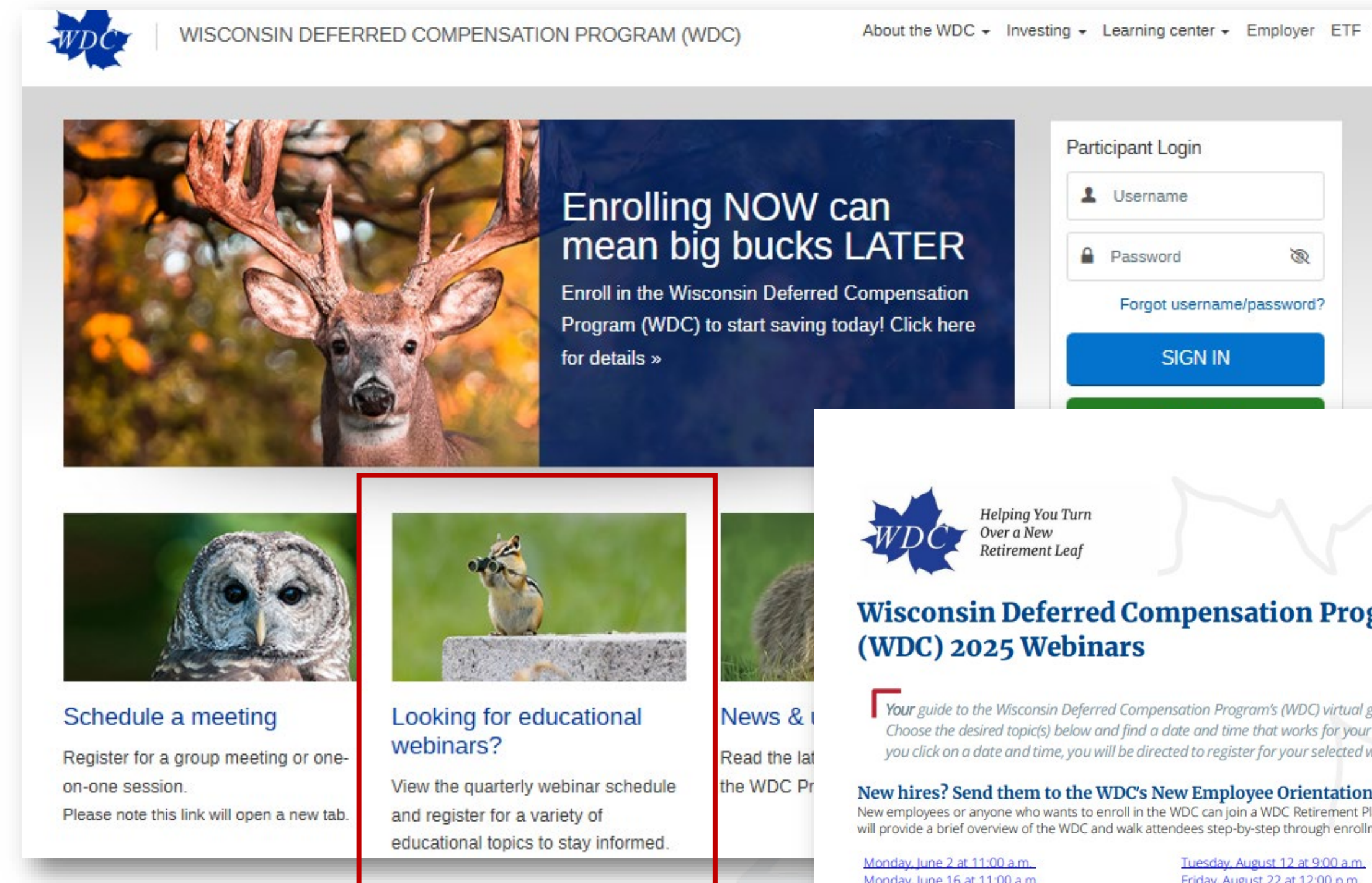
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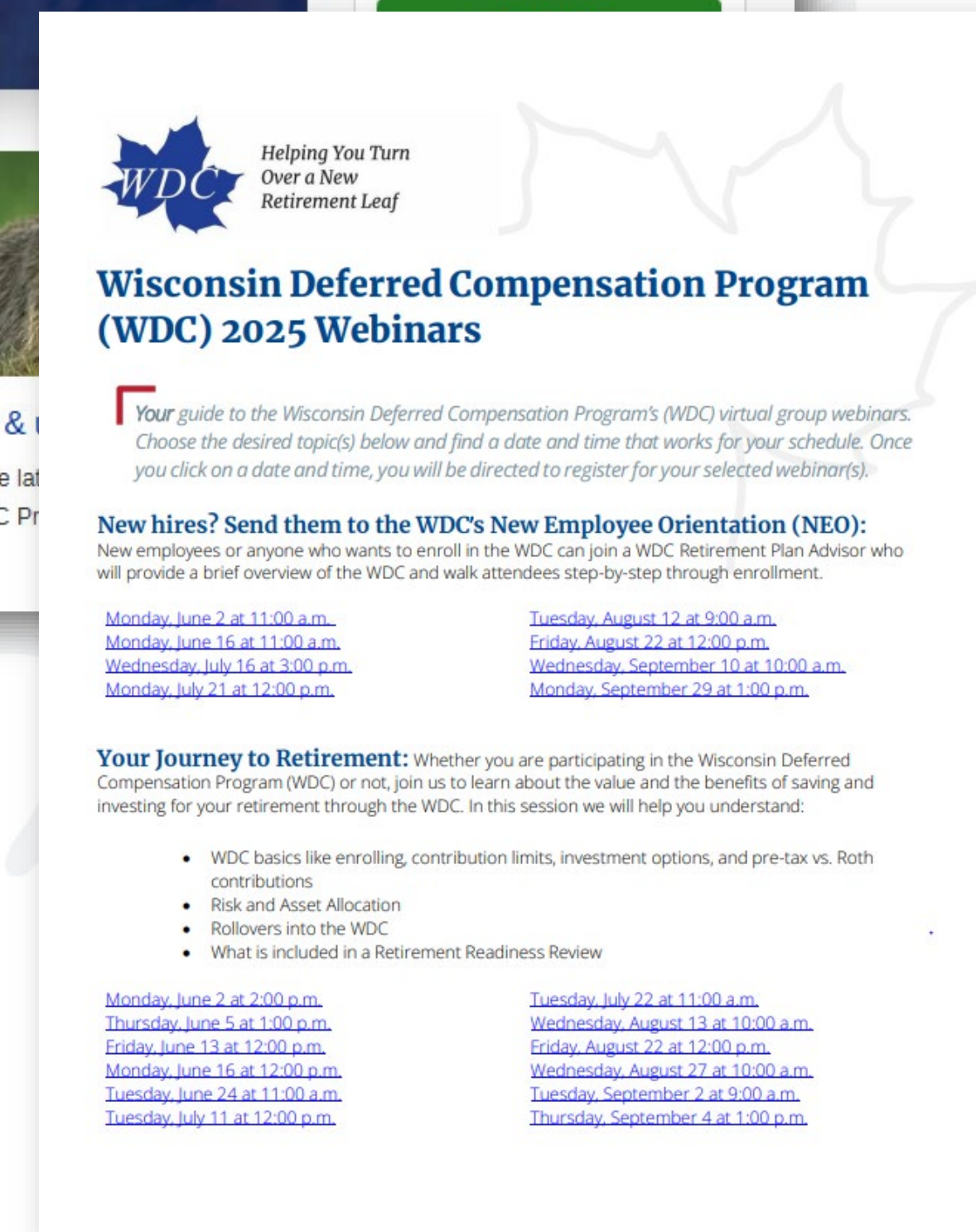
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New webinar website tile

- Audience:
 - All participants
- Tactics:
 - Web tile linking to quarterly webinar schedule




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Employer mini-newsletter 2 of 3

- Audience:
 - All participating employers
- Tactics:
 - Email sent on 5/19
- Email Metrics:
 - 1,585 emails sent
 - Open rate: 50% (avg 53%)
 - Click rate: 20% (avg 2.4%)



Helping You Turn
Over a New
Retirement Leaf

New Plan Enrollment Code Now Available

Employees can enroll in the Wisconsin Deferred Compensation Program (WDC) at any time using the plan enrollment code (PEC) included in the attached [Benefits of Enrolling flyer](#) or by calling the WDC at (877) 457-WDCP (9327). This code can always be found in the Plan Service Center (PSC) under *Participants* then *Employee Forms* then *Plan Enrollment Code*. **The PEC is updated on the day of expiration, not before, and is a necessary security feature.**

Enrollment Forms:
If you have a new employee who already has a WDC account, they have the option to combine their accounts or keep them separate and will need to complete a paper enrollment form to establish their new WDC account with you. The form can be found in the PSC under *Participants* then *Employee Forms* and should be returned via upload or mail.

New hires? Send them to the WDC's New Employee Orientation (NEO)

The WDC offers New Employee Orientation (NEO) webinars. New employees or anyone who wants to enroll in the WDC can join a WDC Retirement Plan Advisor who will provide a brief overview of the WDC and walk attendees step-by-step through enrollment.

Please share this [webinar schedule](#) with your employees, who can select the date and time that works best for them. They will be directed to Microsoft Teams to register and reserve their spot. Check out the webinar schedule, as you will see plenty of topics that the rest of your employees may be interested in as well!

Planning a Benefit Fair this fall?

We ask that you send all requests to the WDC.Office@empower.com no later than **August 15**. School districts, invitations for the WDC to benefit fairs held the last week in August are many and our calendar fills up fast! We do our best to attend as many events as we can. If we are unable to send a WDC representative, we can provide materials and/or help you promote ongoing webinars, future onsite visits, and virtual one-on-one opportunities.

Mark your calendar for the fall Employer Webinar

The annual [employer webinar](#) is scheduled for Thursday, September 18, 2025 at 11:30 a.m. in Microsoft Teams. This webinar will provide updates and training related to SECURE 2.0 provisions taking effect in 2026. Mark your calendar and plan to attend as your action may be required for SECURE 2.0 implementation. Watch for additional details in the WDC annual employer newsletter, which should be out after Labor Day.

Advice for WDC Participants

WDC Retirement Plan Advisors (RPA) continue to work under a hybrid model. If you would like to schedule a WDC presentation and/or in person meetings at your location, please contact the WDC's office in Madison at WDC.Office@empower.com.

Our advisors can look at an individual's full financial picture and give them advice to help them achieve the outcomes they want over time. Employees can access our investment professionals to get the advice and confidence they need, and they can include their spouse or partner. Employee can schedule an in-person or virtual appointment¹ at any time by going to the WDC website at wdc457.org and clicking on the Schedule a Meeting owl picture.

In-person meetings are also available at the WDC Madison office on the far east side of Madison. Participants can click [here](#) to schedule a meeting if they plan to be in the area.

For Plan Sponsor Only

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¹ Retirement Readiness Review is provided by an Empower representative registered with Empower Financial Service, Inc. and may provide tailored retirement education and guidance at no additional cost to participants.

Cybercriminals often use malicious links in scam emails to trick users into revealing sensitive information. To help protect you, the WDC will never use an email or links in an email to ask your User ID, Social Security number, account number, password, or the answers to your password-recovery security challenge questions, such as your mother's maiden name or place of birth. If you receive a scam email claiming to be from the WDC, do not click on any links or attachments and call (877) 457-9327.

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