




# Wisconsin Strong



## ETF Financial Wellness Program Item 3B – Joint Meeting of Retirement Boards



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# Agenda

Overview of  
WI Strong

Marketing &  
Education

Measures of  
Success

# Overview of WI Strong

# NAST Grant Funding

- Partnered with DFI
- Competitive (one of 24)
- 1 year/\$100,000



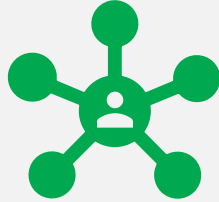
# WI Strong Vision



Holistic



Innovative



Engaging

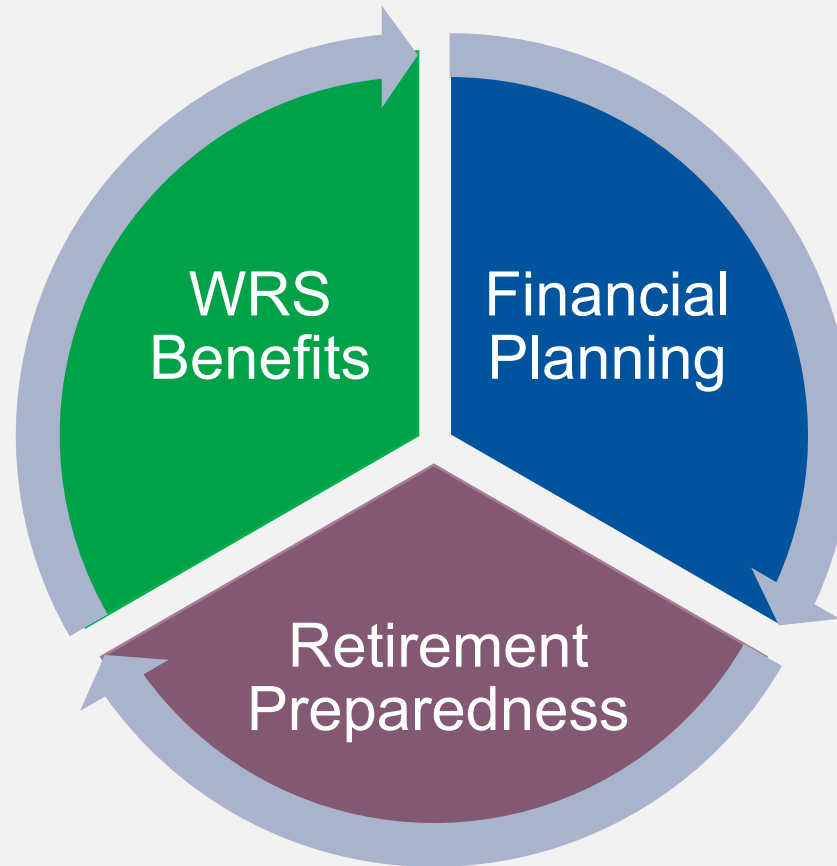


Actionable



Sustainable

# Financial Security + Wellness



# Core Components

- Online financial self-assessment
- Personalized playlist of interactive courses and quizzes
- Monthly webinars
- Education about WRS and deferred compensation benefits
- Partnered with employers to offer customized education
- Toolkit for employer champions
- Targeted education and outreach campaign

# WI Strong Partners





# Marketing & Education

# WI Strong Brand

- Tagline: **Wisconsin Strong: Your Financial Security™**
- Website: [etf.wi.gov/wi-strong](http://etf.wi.gov/wi-strong)
- Hashtag: **#WIStrongSecurity**



# Build Engagement



Partner with  
Employers –  
WI Strong  
Champions



Mass &  
Targeted  
Digital  
Marketing



Online  
Education,  
Tools &  
Resources



Targeted  
Outreach  
Campaigns

# Financial Wellness at Any Age

New Hire

Mid-Career

Nearing Retirement

Retired



# WI Strong Women

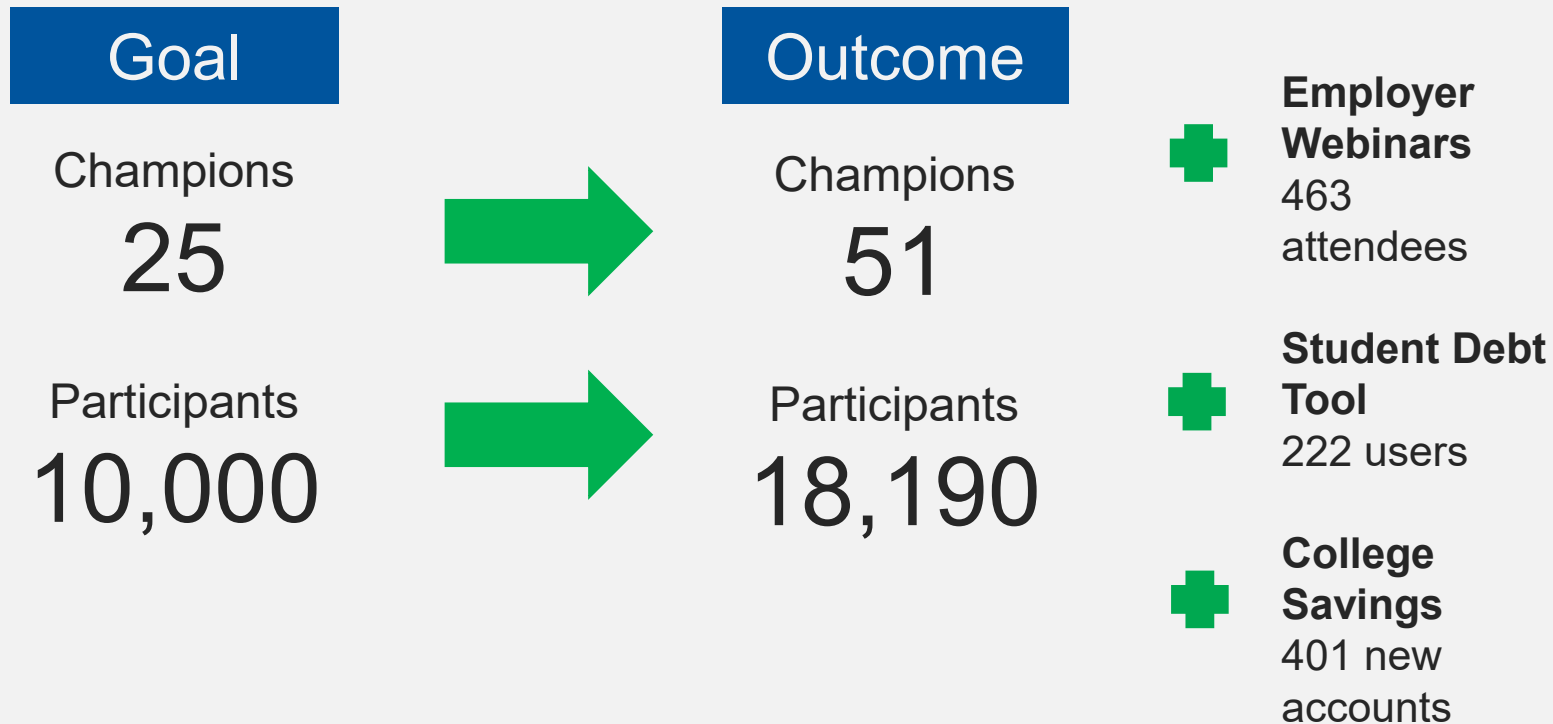
- 8-week campaign to educate women on finances and retirement
- 8 virtual events
- 2,626 attendees



# Measures of Success



# Engagement Results





# Satisfaction Results



3.9

Satisfaction

average, 5-point scale

- **86%** said the program fit easily within their workweek and personal life
- **87%** felt they were given the appropriate tools and resources
- **87%** said they would recommend the program to their coworkers, friends, or family members

# Behavioral Results

- **29%** created or reviewed a budget or spending plan
- **27%** created or reviewed a financial plan
- **21%** checked their credit or made a positive change to improve their credit
- **21%** started or added money to an emergency fund
- **26%** plan to create or review a budget or spending plan
- **26%** plan to create or review a financial plan
- **23%** plan to start or add money to an emergency fund
- **22%** plan to open or contribute more money to a retirement account

# Testimonials

- “Luv it! Wonderful program. Wish it would have come out 20 years ago. Courses are meaningful and helpful.”
- “Got both me and my spouse to methodically review our finances and make changes.”
- “Excellent information in a simple and understandable format!”
- “Easy to understand and navigate. Quizzes reinforced learning.”
- “I really enjoyed learning about the similarities/differences in the confusing terms of IRA’s, 403B’s, 401K’s, Roth IRA’s, etc.”



**Questions?**

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# Thank you

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