



Integrated Participant Communications to Focus on What Really Matters

Deliverables to Drive Adoption

90-120 Days Prior

- Company leadership communication
- Optional postcard announcement
- Recordkeeper call center materials distributed (e.g., FAQs)
- Online communication opportunities
 - ◆ Recordkeeper website
 - ◆ Company intranet site



Letter

FAQs



Postcard

30-60 Days Prior

- Transition brochure mailed if broader plan changes occurring
- Target Retirement Date brochure distributed (hard copy or electronic)
- Target Retirement Date microsite goes live retirement.northerntrust.com
- Fund fact sheets available on website(s)
- Announcement posters distributed (optional)



TRD Brochure



Poster



Fact Sheet



Target Date Microsite

15 Days Prior

- Links to on-demand webcast for:
 - ◆ Recordkeeper website
 - ◆ Company intranet
- Reminder postcard/email with webcast access instructions sent
- Content for new enrollee kit



Webinar



Postcard



Transition/ Launch Date

Post Launch

- Measure participant engagement and activity
- Feedback from record keeper on transition
- Targeted postcard/email to sub-segments:
 - ◆ Potential mixed-use target date fund investors
 - ◆ Encourage participation
 - ◆ Low savers



Postcard