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

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 at retirement.northerntrust.com
- Fund fact sheets available on website(s)
- Announcement posters distributed (optional)

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

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