

Aprio Retirement Plan Services

# Employee Education

## How we help get your employees ready for retirement

We help you design and implement an Education Policy Statement (EPS) which sets clear, measurable goals to monitor the effectiveness of employee education. Utilizing specific goals help identify where gaps are occurring and helps us tailor a strategy to make future education meetings / campaigns more effective.

Each year during our strategic plan review, we look back at the prior year, assess our progress towards the current goals and set new goals for the year ahead.

Here's a snapshot showing part of an EPS 




**Objectives**

To produce measurable results that positively impact the plan and participants' retirement readiness in four key areas:

- **Participation** – A high participation rate is crucial to plan success and participants' retirement readiness. Through proper education and enrollment meetings, the Plan Sponsor hopes to increase overall participation by \_\_\_\_ %.  
Current participation rate: \_\_\_\_\_  
Target participation rate: \_\_\_\_\_
- **Deferral Rate** – A higher deferral rate increases the probability of retirement readiness. Through proper education and enrollment meetings, the Plan Sponsor hopes to increase overall deferral rates.  
Current deferral rate: \_\_\_\_\_  
Target deferral rate: \_\_\_\_\_
- **Account Balance** – The average account balance will help to determine the participants' retirement readiness. Through proper education and enrollment meetings, the Plan Sponsor hopes to see a consistent increase to the average account balance.  
Current average account balance: \_\_\_\_\_  
Target average account balance: \_\_\_\_\_
- **Asset Allocation** – We believe the use of asset allocation strategies is key to matching a participants risk tolerance and goals to the proper mix of funds. Through proper education, the Plan Sponsor would like to see overall use of asset allocation strategies reach 75%, however this year the objective is to raise current use by \_\_\_\_ %.  
Current asset allocation use: \_\_\_\_\_  
Target asset allocation use: \_\_\_\_\_

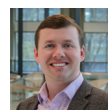
## Moving the Needle

To accomplish our education goals, we utilize a variety of methods:

 Group Meetings	 One-on-One Meetings	 Live Webinars
Pre-recorded video modules	Email campaigns	Call-out campaigns
Direct mail	Breakroom posters / flyers	Web demos to promote tools available on provider's site

AND MUCH MORE!

For more information on Aprio Retirement Plan Services, contact:



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