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Retirement Education:
Are You Helping Your Employees Prepare for the Retirement They Expect?

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Employee Communication and Education Best Practices

Employee Communication

How/When To Communicate:

- Enrollment and Conversion
- Managing Accounts
- Supporting Employees – Ongoing Communications
- Smart Investment Decisions
- Setting and Monitoring Goals
- Protecting Accumulated Benefits
- Market Volatility Seminars
- Targeted Messaging Methods



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Employee Communication and Education Best Practices

Employee Education

What To Communicate:

Define Your Goals

Identify Risk Tolerance

Understand Investment Options

Types of Mutual Funds

Understanding Risk and Potential Reward

Understanding Investment time Horizon

Diversification

Historical Returns of Asset Classes

Portfolio Rebalancing



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