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City of Delray Beach Retirement Plans

Welcome to Empower Communications discovery session

Lori Reed
Sr Strategist Implementation Communication

What we'll cover today

- Key planning milestones
- What you can expect across the rollout
- Key touchpoints before plan go-live

Key planning milestones

- Milestone 1 – Introduction to strategy and goals
- Milestone 2 – Review timeline and employee communication dates
- Milestone 3 – Walk through post-go-live communication and additional communication support

What you can expect from me

- 10 years of experience building strategies for plan transitions
- Support tailored to your employee population
- Flexible approach—able to pivot based on feedback
- Regulatory and optional communications clearly defined

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Implementation Communication Overview

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Agenda

1. Plan sponsor and Empower contacts
2. Logo, style guide, and branding
3. Participant communication deliverables
4. Enrollment experience
5. Personalized, automated messaging
6. Employee education meetings

Plan Sponsor, Advisor, and Empower contact

Plan Sponsor	**Review/approve/inform** 1. TO: Lisa Castronolo 2. CC: Elizabeth Brown
Advisor/ consultant/ counsel	**Review/approve/inform** 1. Matt Dickey
Sr. Communication Strategist (Implementation)	**Lori Reed** Email: lori.reed@empower.com Phone: 303-737-1492

Logo, style guide, and branding

1 Corporate logo(s) usage

Color logo

- Participant website
- Enrollment guide, enrollment email

Black and white logo

- Participant statements
- Plan forms

2 Corporate logo and style guide

- Logos in vertical and horizontal form
- Color, black and white, grayscale, reverse out (white)
- File format: Vector (.eps or .ai) and JPG
- Style guide in Word, PDF, URL
- Color palette for primary and secondary colors (CMYK, RGB codes)

3 Branding options

- Robust image library (lifestyle, industry, abstract)
- Sponsor provided

Multifaceted implementation strategy to help support plan transition

Goal

- Successfully reengage and share information regarding the service provider change with participants

Components

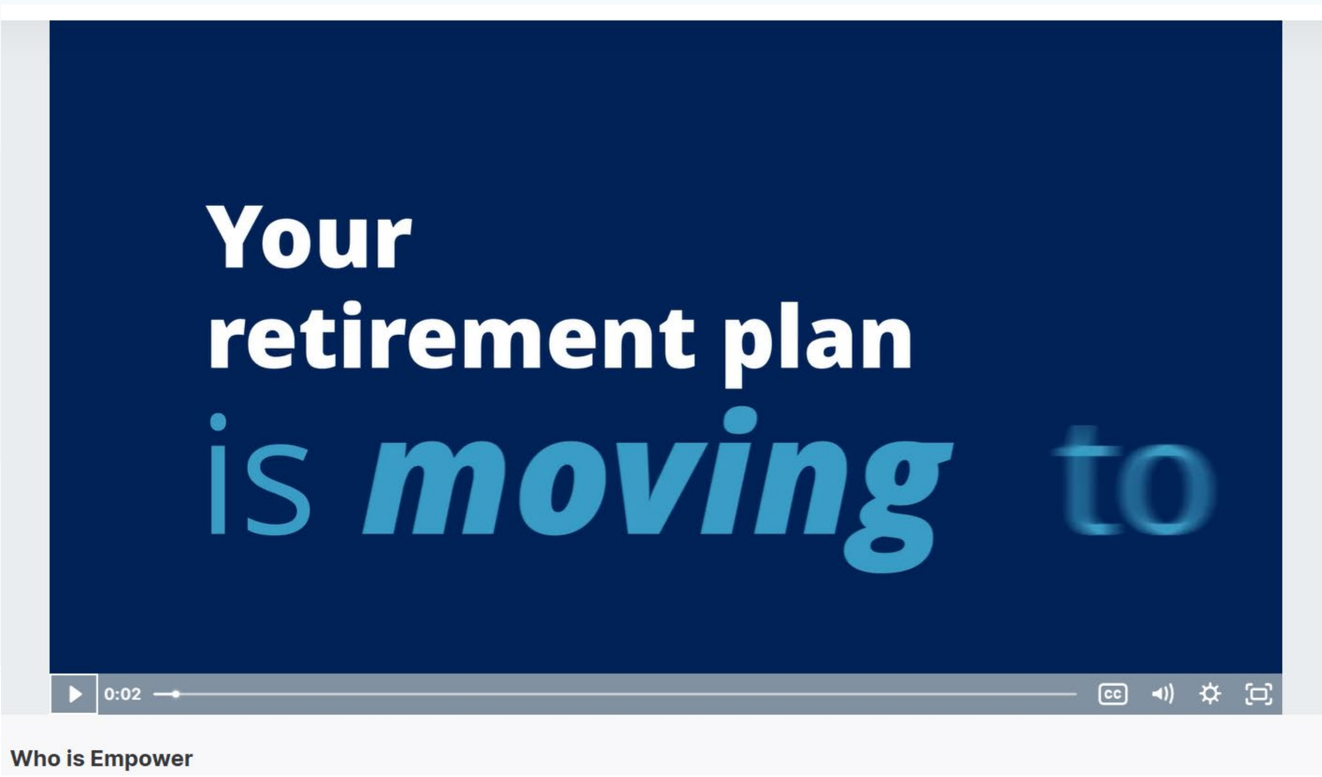
- Emails
- Videos
- E-brochures/posters
- Customer Care Center support
- Frequently asked questions (FAQ)

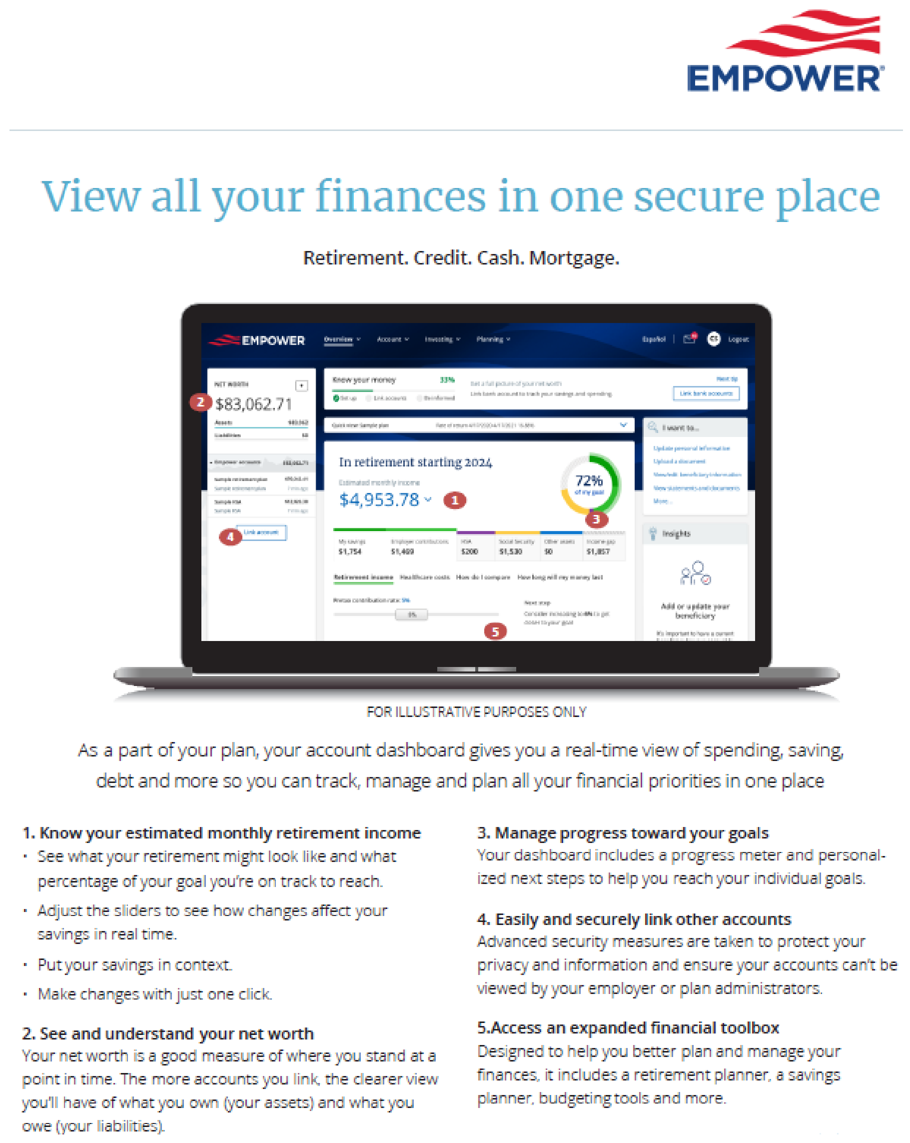
Key message

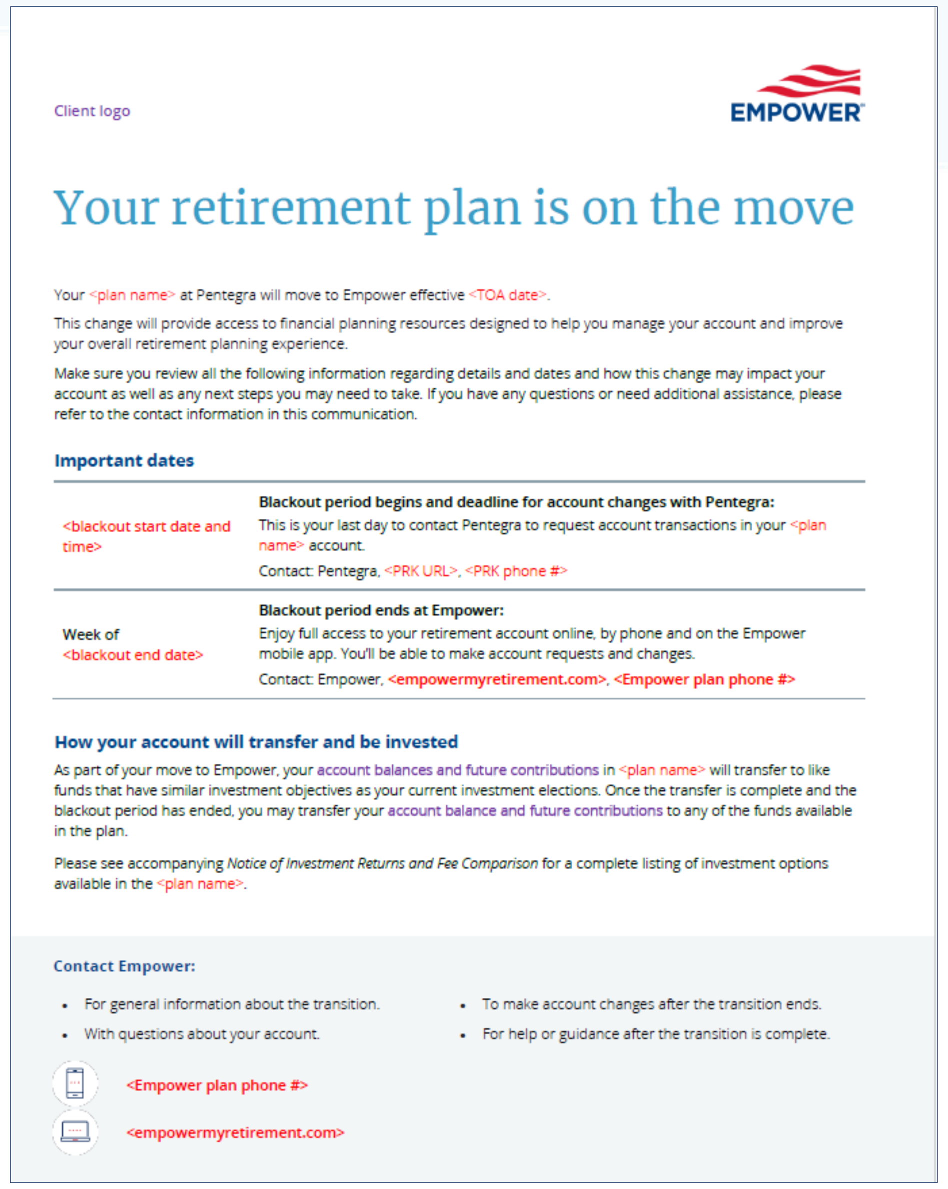
- Understand the move, meet Empower, and learn about your plan.

Audience

- All eligible and active participants, including terminated with balances







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Participant communication deliverables

	Objective/content	Audience	Delivery channel
Announcement (optional) 2-3 weeks prior to SOX brochure mailing	• Inform participants of the upcoming transition to Empower • Generate excitement and renewed interest in the plan • Provide highlights of the Empower participant experience	• All eligible employees (with or without a balance)	• Client-sent email • Internal comms (e.g., intranet, announcements)
Transition guide At least 30 days but not more than 60 days before blackout	• Provide key transition, investment, and date details	• All eligible employees (with or without a balance) • Terminated with a balance	• Email from Empower (print backup if needed)/direct mail by Empower (1st-class mail) • Sponsor email to newly eligible employees before transition
Account is live (optional)	• Blackout has ended/access is available • How to get started online	• All eligible employees (with or without a balance) • Terminated with a balance	• Client-sent email • Internal comms (e.g., intranet, announcements)

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Thank you