

# RetireReady

Your **Primary Source**  
for Retirement Plan Solutions

*Just 18% of workers express confidence that they will have enough money to live comfortably throughout their retirement years<sup>1</sup>. What would your employees say?*

**With the right tools and our expert help, you can help your employees become more confident investors and give them a better chance for retirement success.**

**RetireReady** is a robust education program that drives positive participant behaviors—the ones that lead to more engagement, better saving and investing habits, and an improved chance at a secure retirement.

Through our unique, interactive format that incorporates the latest research into adult learning, behavioral design, and generational differences, RetireReady addresses the topics and actions that are most important for achieving long-term financial goals.

*RetireReady is an ongoing program that produces measurable results.*

Employees will clarify their retirement vision and increase their understanding that actions they take now can lead to a better future. Saving and investing behaviors will improve, as will their confidence and ability to manage money today... and tomorrow.

No other single factor has a greater impact on retirement readiness than the employee's active engagement in their plan. When employees save more and invest better, you gain a more productive workforce that tends to retire on time. Allow us to show you how you can get measurable results and the successful plan you want.

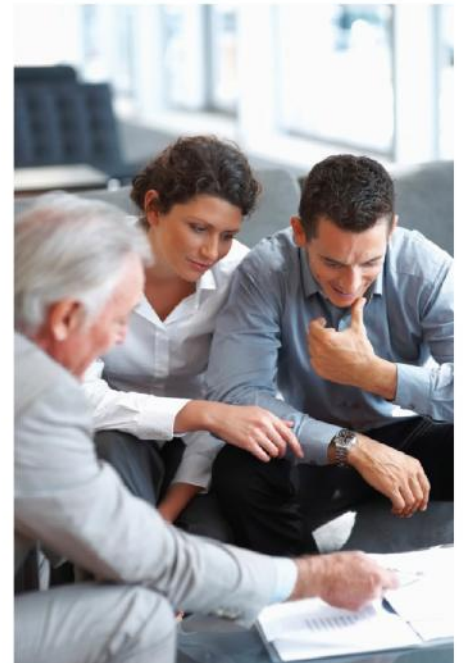
**Help your employees RetireReady.**

<sup>1</sup> 2014 EBRI Retirement Confidence Survey

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## Questions?

Contact us today to learn how RetireReady can help you make a meaningful difference for your retirement plan participants.



## Resources Available Today

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### Encourage Enrollment

#### Saving for Your Retirement Now

This workshop outlines the basics of a workplace retirement plan and inspires employees to start contributing or increase their participation rate.

#### Understanding Your 401(k) Plan

Educate employees how the benefits of a 401(k) plan, investment options, and their plan's features are essential to future financial comfort. Show how they can build a financially secure retirement today.

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### Educate About Saving and Investing

#### Saving and Investing in a 401(k)

Discuss the three key steps in creating a retirement income strategy: planning, investing, and reviewing. This workshop covers how much should be saved, the correct asset allocation, and the importance of active management to ensure that savings keep pace with retirement needs.

#### Managing Your Cash So It Doesn't Manage You

This workshop will help employees see a light at the end of their debt-filled tunnel. It helps them create workable management plans with small successes along the way.

#### Getting Out of Your Own Way: Mind Over Money

Share ideas on interacting with money, plus ways to modify behaviors to improve employees' financial situations. Help them understand how their behavior creates roadblocks to financial success—and provide a step-by-step process to help gain control of their habits and, ultimately, their financial security.

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### Prepare Participants for Retiring

#### Retire Prepared; Will You Be Ready?

Are pre-retirees thinking about retirement? Are they prepared? Do they have a plan in place? Discuss the necessary steps, including income needs, income sources, risks, volatility, and diversification to help prepare employees for a positive retirement.

#### Are You Dreaming or Dazing? A Guide to Creating a Fulfilling Retirement

A well-planned retirement is a well-lived retirement. All too often, folks simply wander into their 60s and 70s without a plan. This seminar provides a road map to help employees create a vision for their retirement—and gives helpful information and resources to use along the way.

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*Help your employees become confident, successful retirees. The RetireReady program gives them the tools they need to reach retirement readiness—and they will appreciate the help you give them. Effective. Measurable. Results.*

**RetireReady. Ask us how.**

