

PLANNING TIMELINE

How to Plan for National Retirement Security Month



National Retirement Security Month is during the month of **October**. Enacted by Congress, the event is designed to highlight the importance of saving for retirement and encourage employees to participate in their employer-sponsored retirement plans.

We've developed a variety of tools, resources and tips to make it easy to conduct your organization's National Save for Retirement Month campaign. Templates or other tools are available at: www.randall-hurley.com/save-for-retirement

OCTOBER

1 FRI

INITIATE a communication campaign for National Retirement Security Month.

4 MON

DECIDE on workplace events for National Retirement Security Month.

7 TH

SEND OUT our flyer with instructions for the NRSM raffle entry! **NOMINATE** a Super Saver employee for a chance to win a gift card.

5 TH

POST a flyer reminding employees about National Save for Retirement Week.

11 MON

SEND your employees an email reminder about National Retirement Security Month and our raffle.

13 WED

SHARE our retirement readiness infographic reminding employees about National Retirement Security Month.

15 FRI

ENGAGE employees with a mid-month activity.

18 MON

PROVIDE a needs assessment handout so employees can determine their retirement readiness.

20 WED

SHARE our Savvy Saver handout.

22 FRI

KEEP the momentum going with a staff activity. Visit our Resource Center for more ideas.

25 MON

HOST an informational meeting about your plan. Use our template for guidance.

29 FRI

EVALUATE the results of your National Retirement Security Month efforts. momentum.

**RANDALL
+ HURLEY**

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