



WORKPLACE EVENT IDEAS

How to engage employees in National Retirement Security Month

Increase awareness about the importance of saving for retirement and encourage participation in your company's retirement plan by hosting a National Retirement Security Month campaign. As part of the campaign, consider hosting a few virtual or workplace events. The following list should get you started.

You may also wish to provide employees with an incentive for participating in some or all of these events. Incentives can be as simple as candy bars, lunch or beverage gift cards, or raffle tickets, or points toward a larger prize.

- + Begin by making sure employees understand how much they need to save for retirement. For a quick estimate, employees can use the Retirement Needs Calculator on our website at www.randall-hurley.com/save-for-retirement.
- + Designate one day as "Bring Your Lunch to Work" day. Have everyone eat together and discuss how saving even a little can add up to a lot of retirement savings (this works on Zoom too!). Use the poster on our website to promote your event. You can share our Savvy Consumer handout or provide the link to all employees. Offer an incentive for those who join you for lunch.
- + Conduct a virtual seminar using our ready-to-go template. This presentation is available in PDF and PowerPoint formats. Your plan consultant can help you with any questions you have about this material. (You can choose to present all the material at once or break it up over the course of several days.)
- + Invite your plan's investment advisor to do a Zoom presentation sometime during the month, or provide their contact information after discussing the importance of asset allocation and diversification.
- + Have your benefits specialist host a "Create Your Unique Retirement" session where employees can ask questions about the retirement plan. They can also have summary plan descriptions and enrollment/change forms available.
- + Encourage employees to begin contributing or increase their contributions during the month. Provide a token incentive for those who take action.