



iJoin[®]
Personalizing
Retirement Success

Your Retirement Plan Success

As a competitive employer, you know your retirement plan is more than a line item benefit. It's an important element in your strategy to attract and retain top talent. It also creates an opportunity to foster a critical long-term savings path for your employees' retirement.

With **iJoin**, your employees will enjoy a uniquely personalized, goal-based experience that helps them take steps towards financial independence. And you and your plan advisor will benefit by new data insights and communications to help keep your people on track to success.

1

**Goal-based approach
to engagement and
investing**

2

**Actionable
information for you
and your advisor**

3

**Employees on path
have less stress and
are more productive**

iJoin makes it easy for you to focus on employee communications and engagement on outcomes.



Trends on **participation rate**, **goal completion percentage**, and **match optimization** help answer the question, “**How well are we doing?**”

Your iJoin Plan Health Report quantifies period-over-period performance trends that illuminate opportunities to communicate and act.



- ✓ Employee pool - participation
- ✓ Goal success by age group
- ✓ Participation by age group
- ✓ Performance by age group
- ✓ Percent maximizing match
- ✓ Investment analysis
- ✓ Terminated with Balance

With **iJoin**, you'll know more than who's participating. You'll know who's on track. And you'll gain peace of mind that employees are being encouraged to take meaningful action to improve their savings path.

That's what plan success metrics are all about.

Communication Is Everything!

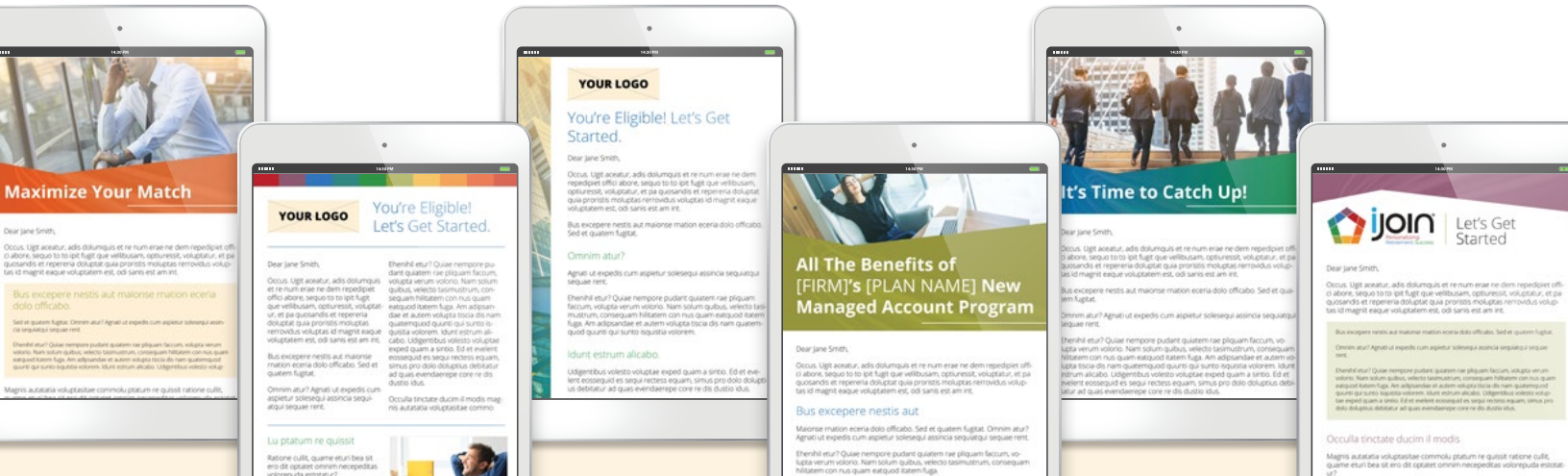
You know how important communication is in setting expectations and helping your employees understand the value of long-term investing in your retirement plan. Until now, it has been difficult to identify employees who may be “at risk” when it comes to achieving a secure retirement.

With **iJoin**, your retirement plan team can target employees with timely messages that **encourage successful savings behaviors**. We'll check in at regular intervals and at important moments in their financial life and encourage them to take action to improve their savings path.



When we reach out...

- ✓ Eligible, but not participating
- ✓ Haven't visited in [X] days
- ✓ Are not maximizing match
- ✓ Will become eligible (iJoin Intro)
- ✓ Introduce / reinforce MAP
- ✓ Short of Goal (by Age Groups)
- ✓ Short of Goal (by Income Bracket)
- ✓ Terminated w/ a balance
- ✓ Long-term investor (COVID-19)
- ✓ Dollar Cost Averaging (COVID-19)



Deliver on the Promise of Better Participant Outcomes

iJoin is a better enrollment, re-enrollment, and engagement experience that answers the **three questions** most people have about saving for retirement:

- 1** How much money will I need in retirement?
- 2** How do I know if I'm saving enough?
- 3** How can I close the gap and reach my goal?

By engaging employees throughout their retirement savings journey, you can deliver on the promise of better outcomes by helping them take positive steps that help produce long-term success.

iJoin will help you deliver a better employee experience and demonstrate the value of the retirement plan benefit you provide.



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