



Communication Goals Worksheet

Current Profile

The current plan profile for _____ as of _____ is:

- Number of eligible employees: _____
- Participation rate: _____
- Approximate average deferral: _____ Pre-Tax and _____ Roth
- Total deferring: _____ Pre-Tax and _____ Roth
- Number deferring less than company match level of _____ %:
- Number not deferring: _____
- Asset allocation:
 - Managed portfolios: _____ % of assets and _____ participants
 - Target Date/Risk Based funds: _____ % of assets
- Other important profile characteristics:
 - _____
 - _____

[For 403(b) plans, who [is][are] your current provider(s):

Are there special considerations to take into account regarding limitations from current providers?

Objectives

The objectives of the _____ 's Communication Program are:

- _____
- _____
- _____
- _____

The plan's quantifiable goals and objectives for the plan year are:

- _____
- _____
- _____
- _____
- _____

Other important plan goals:

- _____
- _____

Advocate Training Program

Representatives are available to conduct Advocate Training Program sessions for _____ 's HR staff and key personnel.

Key personnel can be identified as retirement plan "advocates." These staff members will be an integral part of the campaign and a valuable resource for _____ 's ongoing enrollment process.

Having such advocates for the retirement plan may help you get closer to reaching your communication goals.

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