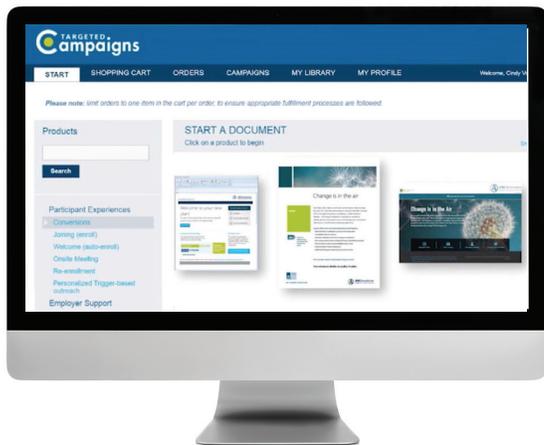


# Simplify retirement plan conversions

## OPTIMIZE THE EMPLOYEE INVESTMENT JOURNEY WITH INTELLIGENT, AUTOMATED COMMUNICATIONS

- Build winning campaigns from customizable templates.
- Ensure flawless execution with automated workflows.
- Achieve successful outcomes based on data-driven insight.



## CUT THROUGH CONVERSION COMPLEXITY WITH A TURNKEY SOLUTION

Successful retirement plan conversions require planning and coordination across a multitude of critical project details, complying with regulations and engaging both participants and non-participants with timely, effective communications. All this must be done while keeping a tight rein on costs. The stakes are high and time is of the essence.

Yet teams often struggle, as disconnected data, inefficient manual processes and incompatible systems create roadblocks to success. Creating one-off, in-house solutions is difficult, time-consuming and expensive. There's a better way. Broadridge can help you get off on the right foot, build trust with your new client, and demonstrate significant value from day one, each and every time.

## ADOPT A BLUEPRINT FOR SUCCESS

Our step-by-step blueprints are based on deep industry expertise, making it easy to connect the dots, synchronize all the moving parts and optimize outcomes. Simply input the relevant conversion information and our smart solution automatically handles communication tasks, while you monitor progress from a user-friendly dashboard. See at a glance how your campaign is working, and easily adjust tactics to improve performance.

## EVERYONE BENEFITS

A seamless, automated process optimizes results for all stakeholders.

- **Greater ROI:** Deliver more effective communications at lower cost.
- **Enhanced Productivity:** No more spending hours on manual tasks.
- **Better Participant Experience:** Enable personalized, two-way communication.
- **Improved Outcomes:** Empower participants to understand what's happening to their money and potentially save more.
- **Operational Excellence:** Easily implement timely, correct and compliant campaigns.
- **Accountability:** Detailed performance metrics provide proven solutions.

## EASILY MANAGE THE ENTIRE CONVERSION PROCESS, FROM START TO FINISH

Stop struggling with multiple tools and manual processes. One comprehensive, scalable solution gives you end-to-end efficiency, visibility and control. Program setup is straightforward and includes flexible options for creating custom campaigns. A single, automated workflow manages every step from initial engagement to education and ongoing enrollment, so your team is free to concentrate on strategy. Effortlessly drive results with:



### EXCEPTIONAL DATA ACCURACY

With our industry-leading tools and expertise, you can efficiently aggregate and normalize employee data from multiple sources to ensure flawless execution.



### ENGAGING CONTENT

Quickly create personalized content for multiple plans, touchpoints and personas. Precisely targeted and timely communications help increase participation and improve outcomes.



### OMNI-CHANNEL MANAGEMENT

Deliver consistent messages that create meaningful experiences no matter when, where or how participants choose to interact. Preset timelines and automate delivery across channels in accordance with user preferences.



### INTEGRATED ANALYTICS

Continuously measure performance via a user-friendly dashboard. Gain actionable insights and the agility to change tactics as needed.

## CONSTRUCT CAMPAIGNS WITH DATA-DRIVEN INSIGHT

Create highly relevant, participant-centric communications that make it easy to take action. The platform's "Create Once, Distribute Everywhere" model combines data feeds and business rules to enable complex composition for cross-channel distribution. Proven, pre-built templates, automated workflows and integrated metrics and reporting save you time and effort, while keeping everything on track. Your intuitive toolkit provides everything you need to launch effective, personalized campaigns, including:

- User journey template framework
- Automated behavioral tracking
- Triggered nudges
- User reporting
- Data error management
- Sponsor insights and status updates

## PROVIDE TIMELY, PERSONALIZED GUIDANCE ACROSS THE CUSTOMER JOURNEY

Create personalized journeys based on each individual's goals, savings and stage of life. Develop lasting relationships with automated timelines that deliver the right communication at the right time, for every milestone. Capture and analyze detailed metrics. Apply learnings to facilitate engagement at every touchpoint, and help participants make the most of their plan.

- Understand the benefits of their new plan
- Optimize investments
- Increase contributions
- Maximize employer match
- Make catch-up contributions
- Ensure retirement readiness

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