

Communication & Education Partnership Plan

Site Location:

Administrator:

No. Staff:

Communication & Education Plan Purpose

In partnership with key administrators like you, we will engage and educate employees about the benefits of their workplace retirement plan by leveraging on-site opportunities. We are committed to supporting all employees in attaining financial wellness through convenient face-to-face interaction with financial professionals during appropriate times at their workplace.

Event	Overview	Dates
Staff Start Date		
New Hire Orientation	<ul style="list-style-type: none"> • 5-10 minutes • Summary on the importance of saving in a workplace retirement plan • Schedule 1:1 consultation appointments 	
Faculty/Staff Meetings		
Open Enrollment		
Benefits/Wellness Fair(s)		
Site Visits		
Workshops		<ul style="list-style-type: none"> • Assorted topics • Virtual or in-person • Hosted quarterly
Professional Days	<ul style="list-style-type: none"> • Schedule on-site visit or meeting • Appointments with staff 	
Volunteer Opportunities		
Annual Review	<ul style="list-style-type: none"> • Discuss outcomes of communication plan • Optimize for Next Year 	

National Communication Calendar

Corebridge provides ongoing communication and education to drive engagement and build financial wellness with your employees. This is achieved throughout the year with monthly emails, phone calls and workshops, meeting employees where they are with content personalized to them.

	Financial wellness				Retirement readiness				Protection			
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Targeted education Targeted email messages are versioned based on participants' key needs	New Year's Resolution	Importance of Saving	Have a Plan in Place	Financial Capability/Wellness	Goal-Setting	Mid-year Checklist	Diversification	Beneficiary/Trusted Contact	Protecting your Future	National Retirement Security Month	Cyber Security	Thank You & Happy Holidays
National events Plan Sponsor toolkits available for additional promotion				National Financial Capability Month	<ul style="list-style-type: none"> Hospital Week Teachers Week End of School 			Back to School		National Retirement Security Month		
Webinars National webinar series with monthly curriculum aligned to timely topics.	Tax Support	Saving Tips	Retirement Pathfinder	Financial Wellness	Retirement Readiness	Social Security	Financial Security	Inflation	Lifetime Income	Financial Wellness	Inflation	Tax Support

corebridgefinancial.com/retire 1.800.448.2542

We're here to help you take **action**

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