

Help Foster Financial Confidence with Worksite Financial Solutions

Congratulations on offering your employees Worksite Financial Solutions—a guidance-based, beginning-to-end retirement program that pulls all financial aspects of retirement into a single, manageable focus that saves time. The Plan Sponsor Implementation Kit contains materials that will help you make the most of Worksite Financial Solutions. The contents have been customized according to the service(s) your plan has enrolled in:

- [The Employee Engagement Solution](#)
- [The Employee Education Solution](#)
- [The Employee Advice Solution](#)
- [The Employee Transition Solution](#)

Within the kit you will find important resources that will help guide you through the process of rolling out Worksite Financial Solutions and effectively communicating the new benefit to your employees:

Implementation Checklists serve as helpful reminders of the steps required to roll out the service and the approximate timeframe to complete them.

Marketing Overview Brochures contain a summary of the marketing materials that are available to support Worksite Financial Solutions, including an overview of the employee outreach campaign materials and schedule.

Outreach Campaign Sample Kits provide large scale samples of the communications that will be sent out to your employees to inform them of the new benefit to their retirement plan.

Additional Marketing Material Samples such as flyers and posters that can be distributed in the workplace to enhance your marketing and communications effort with your employees.

The **Worksite Financial Solutions USB Drive** contains electronic copies of the materials in the kit, plus email templates and videos you can use with your employees.

As your retirement plan advisor, I'm here to help guide you through the implementation process and answer any questions you may have. I would like to suggest we meet to review the contents of this kit and discuss how to best utilize the available marketing materials to ensure your employees understand and receive the full benefits of this program. By offering Worksite Financial Solutions as a benefit to your company's retirement plan, you've taken a great step toward helping your employees get on the path toward a more secure financial future.

Sincerely,

<Plan Advisor Name>

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