

CE&A Financial Foundations

New Year Check In

New Year Check In - 2024 Campaign Strategy

Objective:

• Leverage the start of a new year, a time when people are setting new goals, as an opportunity for participants to review their retirement savings and investment strategy and adjust their plan.

Goals:

- Drive advice to help ensure participants are maximizing their retirement plan
- Promote increased savings rates to help ensure participants can reach their savings goal
- · Build financial literacy on investing topics

Audience:

- Active participants (non wealth engaged) who have had a contribution to their account within the past 6 months
- Age >18 and <80
- Total Assets > \$0

Marketing Activation:

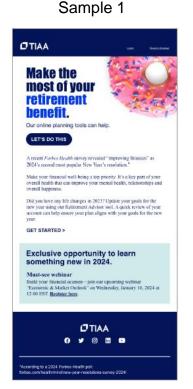
- Email
- · Website main account page banners
- · Social Media

Timing:

- Initial deployment early January
- · Resend to participants who didn't open/click two weeks after initial deployment



New Year Check In - 2024 Creative Sample







Sample 3





Subject Line: <FirstName>, a lasting resolution that's easier than cutting sweets.

Pre-Header: It's time for your New Year's check-in.



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