Q3 2024: AT A GLANCE

Communications to **welcome, know** and **help** employees

July	August	September
PROACTIVE CALENDAR AND EVENT-BASED COMMUNICATIONS		
• FidBits Newsletter • PP&A Enrolled Quarterly Check-In	• FidBits Newsletter • Annual HSA Contributions Campaign • PP&A Enrolled Outside Assets Campaign	• Quarterly Check-In
NEW RESPONSIVE MILESTONE AND ACTION-BASED COMMUNICATIONS		
• Student Debt Retirement Eligible Campaign		
Review existing responsive communications any time at C&E Resource Center		
OPERATIONAL AND REGULATORY COMMUNICATIONS		
• Quarterly Statement Reminder		
PLAN SPECIFIC COMMUNICATIONS AND EVENTS		

Communications to **welcome, know** and **help** employees

July

FidBits Newsletter – Employees will receive educational resources such as podcasts, webcasts, and articles, so they can be better prepared to navigate life's challenges and help them become more financially savvy, no matter where they are in their financial journey.

PP&A Enrolled Quarterly Check-In – Informs enrolled participants of their investment strategy, progress towards goals, and next steps to consider, including Personal Profile review and update.

Student Debt Retirement Eligible Campaign – This is a new, always-on campaign that is sent biannually. This two-touch email campaign sent to all Student Debt Retirement (SDR) eligible not-enrolled participants. The campaign launches with its first send during the week of August 26, 2024. Subsequent biannual sends will be triggered each March 1 and August 1 thereafter.

August

FidBits Newsletter – *See July description.*

Annual HSA Contributions Campaign – This annual campaign is sent to HSA accountholders and HSA-eligible participants who are not contributing to their HSA, or who are on track to contribute <85% of the IRS limit for the year. The campaign educates employees about their ability to update their contribution amount throughout the year, and the money-saving benefits of doing so.

PP&A Enrolled Outside Assets Campaign – This email campaign specifically focuses on getting participants to add their outside accounts to their Personal Profile so we can help make the most of their managed account.

September

Quarterly Check-In – Provides employees with a personal assessment of their retirement savings progress and next steps, along with resources to help build their confidence in managing everyday financial matters.