

Sample ONLY. Certain text may not appear based on plan design or may change slightly based on participant data.

Subject: Where will your money go, John? Make it official.

Preheader: Make your selection and help protect your money and those who matter.



JOHN SAMPLE
THETA WORKPLACE SAVINGS PLAN

Login



Decide where your money goes

[Add a beneficiary](#)

You’ve registered for your retirement savings account. Nice work. The next step is naming a beneficiary—the person who would receive your savings if something happened to you. It could be a partner, a child, a parent, or anyone you choose.

Adding a beneficiary can save time and stress—and it’s easy to do. You just need their name and date of birth to get started. And if something changes, you can update it at any time.



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