Separated Participant Communications Program Overview

Robust resources and education for participants who are navigating major life events like a job change or retirement

Newly separated

One-time emails sent within the first 30 days of their job change or retirement, triggered based on the change in the participant's status code.

Tenured separated

Ongoing reminder sent 6 months after separation and each year after that if no action is taken.

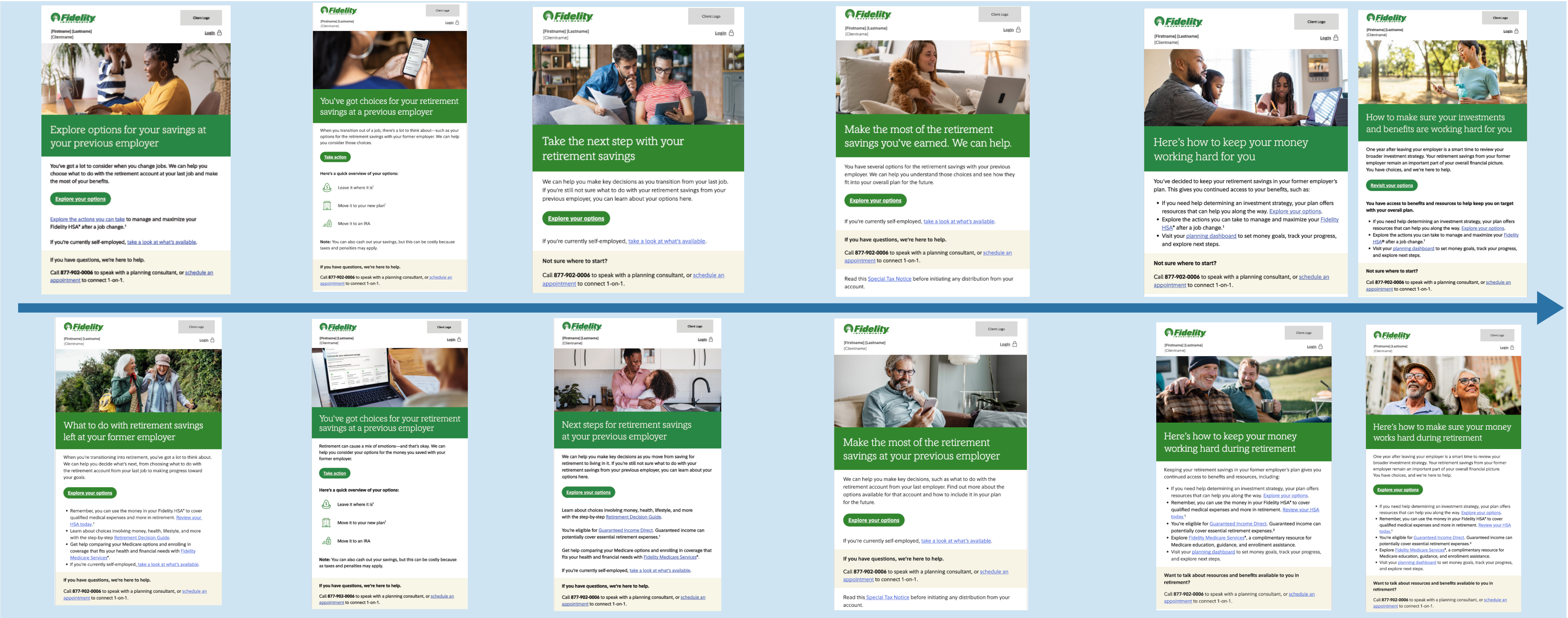
Stay in Plan selection

Sent day after this selection is made in the NetBenefits® Distribution Options Guided Experience and one additional touch 365 days later

Job Changers

Pre-retirees / Retirees

Day 1: 402(f) / 411a11 tax notice Email with print back up.



[Click here to review additional details and samples]

Day 7	Day 15	Day 30	Day 180	Stay in Plan Touch 1	Stay in Plan Touch 2
Explore distribution options	Understanding distribution options	Take your next step	Revisit distribution options	Stay in Plan	

Samples for illustrative purposes only. **For plan sponsor use only.**

This program overview shows offerings specific to the separated audience; this is not an exhaustive list of communications; deployment timelines are subject to change.