

# Make Today YOUR 401(k) Day!



## GUIDE

for using PSCA 2014 campaign materials for YOUR plan

This campaign has TWO theme options from which to choose to help you increase participant awareness and appreciation for your retirement plan.

Remember, every day is 401(k) Day! And, the communications campaigns the Plan Sponsor Council of America (PSCA) has created are ready for you to use.

### About the campaign

You can use one or the other, or BOTH! You could even consider targeting by age group.

#### Option 1: Great Moments in Retirement History

Pique your employees' interest in learning more about your retirement plan by using a little bit of humor. From prehistoric times to landing on the moon, the need for a retirement plan has always been there!



#### Option 2: Infographic style

Bright colors and thought-provoking chunks of information call attention to why an employee should save, and how he/she can save even more.



Each set includes:

- An 11"x17" poster
- An 8.5X11 flyer — print the first page only for a desk drop, or both sides and add mailing information
- Email header
- PowerPoint graphics

A Spanish component and 403(b) version are also offered.

### How to customize the materials

The poster and flyer are delivered to you with an edit feature that allows you to insert your logo and plan-specific contact information. Here are step-by-step instructions for doing so:

#### To insert your company's logo:

1. Open PDF and save the file to your desktop or a folder on your computer.  
Tip: Make sure you also have your company logo saved to your computer.
2. Once PDF is saved, click on the "Tools" tab in the toolbar. Choose "Advanced Editing" and then "TouchUp Object Tool." Right click your mouse and choose "Place Image."
3. Browse your system and choose a logo to upload. You can move and resize the image as necessary.  
Tip: Use a JPG or TIFF file for your logo.
4. To insert your plan's Web site, double click on the space "<>" and you will be able to fill in the text that you want.
5. Save your personalized version of the PDF.

For the email banner, insert the jpg into an open email.

To use the PowerPoint, manipulate the graphics as appropriate for your presentation.

The communications can be customized with your company's logo and your plan's Web site.

## Ideas for your company's 401(k) Day

We've created campaigns that are informative and eye-catching — now, you need to decide how to best use it for your company and employees.

### Step 1: Create a plan.

As you're developing a plan, think about these things:

- Timing — Do you want to provide the materials at different points in the year, or all at once?
- Events — Are you planning an educational event to coincide with print materials? (See event ideas on Step 2.)
- Demographics — Will one option appeal to your younger employees, and the other to older employees?
- Delivery vehicles — In addition to the materials provided, think about other ways you can create a buzz about the campaign, including:
  - Intranet (you can add the email banner or PowerPoint graphics for more punch!)
  - Company e-mail (don't forget the email banner!)
  - Internal newsletter
  - All-hands meetings
  - Bulletin boards and breakrooms/cafeterias
  - Message from an executive
  - Desk drop
  - Voicemail blast

### Step 2: Prepare for your event.

If you're planning an event or series of events, decide what kind of event you want to host:

- A Lunch-n-Learn — Employees can participate in a presentation over the lunch hour. You can ask them to bring their own lunch, provide lunch or offer refreshments
- A presentation — Consider offering several times to fit employee schedules
- A benefits fair or booth — Employees can stop by when they're available
- A Webcast — If you have an online workforce or a number of locations, consider having an electronic event

### Once you've decided the type of event, you need to get the word out so employees attend.

- Hang the posters two to three weeks prior to the event to generate interest. Send out mailings around the same time.
- Send out electronic invitations, including meeting invites that people can save to their work calendars. Additionally, provide reminders the week before the event, and the day before the event.
- Consider making the event mandatory to show employees how important it is to plan for their future. Just because the focus is on your retirement plan doesn't mean you can't offer information on other financial benefits your company offers. Check with other benefits providers to see if they can supplement your efforts.

### Step 3: Implement your campaign

#### Share your 401(k) Day campaign stories

We would love to hear from you on what you did for your 401(k) Day campaign. And, we will share success stories, ideas and tips right here throughout the year that will inspire all of us! So, please, don't be shy .... tell us your story today! [Bob.benish@psca.org](mailto:Bob.benish@psca.org)

## Remember....

