



2026 Signature Award Categories

Provider Innovation

The Retirement Plan Service Provider Innovation award highlights service providers that bring pioneering ideas, services, or solutions to the retirement planning industry. This award typically acknowledges innovation in technology, investment strategies, or administrative services within retirement plans that is effectively communicated to educate plan sponsors and/or participants to increase outcomes. It celebrates those who introduce new methods to enhance plan effectiveness, improve participant outcomes, streamline processes, or offer unique solutions to challenges faced by retirement plan sponsors and participants.

Examples: Complete education campaigns with a unique or innovative approach, targeted campaigns addressing a specific problem with a unique solution, etc. Can be materials specific to one plan sponsor or general materials used across the client base. Can be plan sponsor or participant communications.

Emphasizing Diversity, Equity and Inclusion Within Retirement Plans

Greater focus is being placed on diversity, equity, and inclusion in the workplace and in all aspects of life. Companies are highlighting individual differences, providing equal opportunities for growth and development, and treating each other with dignity and respect. This category showcases examples of how retirement plan communications are embracing these individual differences by using more inclusive language, imagery and other creative methods.

Examples: Entries in this category include print or digital communications relating to any diversity topic or non-majority employee group aimed at retirement and financial wellness, such as increasing participation among minorities, women or other populations. Other examples could include retirement focused communications in different languages and those which acknowledge cultural differences.

Financial Wellness

Financial wellness programs work to address employees' total financial circumstances, rather than focusing solely on retirement. These programs can help employees with cash management, debt reduction strategies, saving for college, home buying and other financial life events that people face throughout their careers. This category seeks to highlight financial wellness programs offered by specific plan sponsors that achieved significant results.

Examples: Programs that provide solutions for the different needs of diverse employees, groups, or on-going targeted campaigns covering various participant behaviors. Campaigns can include those that cover a single financial need, or multiple needs, such as balancing financial needs, saving for college, student loan debt, budgeting, debt management, etc. Please ensure that the campaign involves general financial education, rather than education focused on the retirement plan, unless it is positioned as part of an overall wellness initiative. Metrics of a successful campaign could include things like increased financial wellness scores, reduced debt, reduced financial stress, percentage of participants reached, etc.

**Innovation in Promoting Participation**

The Innovation in Promoting Retirement Plan Participation award celebrates creative and effective strategies implemented by plan sponsors or financial service providers to encourage and increase participation in retirement plans. Recipients of this award often showcase innovative methods, educational initiatives, or engagement programs that successfully boost the number of employees enrolling in and contributing to retirement plans. These strategies might involve creative communication, targeted education campaigns, behavioral finance techniques, or technology-driven solutions aimed at motivating employees to actively engage in retirement planning.

Examples: Print or electronic communications that result in more people deferring in the plan, or greater savings by participants already saving something in the plan.