

401(k) DAY™

September 6, 2024



**Building Your
Financial Future:
Start Today,
Retire Tomorrow**



Campaign Overview

We recommend three phases to rolling out this campaign:

- 1) Campaign Launch**
- 2) The Event/401(k) Day**
- 3) Follow-up**



Phase 1: Launch

Campaign Launch (Early September or prior to event):

- Send out initial emails with campaign details.
- Distribute posters and flyers in common areas.
- Promote workshops, Q&A sessions, and social media engagement.



Phase 2: The Event

401(k) and 403(b) Day (September 6, 2024, or another day that works for you):

- Host educational sessions and Q&A sessions using the “fact or fiction” PowerPoint.
- Run interactive activities and offer incentives.
- Consider:
 - Weekly sessions throughout September with different focus areas each week.
 - Showcase real-life success stories from participants to motivate and inspire employees.
 - Having an advisor, retirement planning experts, and HR representatives available.



Phase 3: Post-Campaign

Follow-up 2-4 weeks later:

- Send follow-up emails with additional resources.
- Collect feedback through surveys.
- Review and report on campaign success, sharing key metrics and success stories with the company.

