

Make Today YOUR 401(k) Day!



“How-to Guide”

for using PSCA 2012 campaign materials for YOUR plan

Increase participant awareness and appreciation for your 401(k) plan with this year’s “Dream Like a Kid” themed “Make Today Your 401(k) Day!” campaign.

In 2012, every day is 401(k) Day! And, the communications campaign the Plan Sponsor Council of America (PSCA) has created for your 401(k) plan provides you and your participants with plenty of big thinking on the topic.

You need to plan a communications campaign for your 401(k) plan. Luckily, we’ve done all of the work for you – you just have to use it. As every day is now a 401(k) Day, you are free to start today or next month.

Each set includes:

- An 11”x17” poster with the key messages tied to each theme.
- A matching flyer.
- A 6”x 9” mailable postcard – with the ability to input your logo and contact information.

A 403(b) version is available!

Contents:

- About the campaign
- How to use it
- Ideas for your company’s 401(k) Day
- How to share your success stories

ABOUT THE CAMPAIGN

The 2012 401(k) Day campaign uses nostalgic kid-themed graphics to draw the attention of your employees. The key messages provide information and education regarding saving for retirement in actionable terms. The entire campaign can be used at one time, or spread throughout the year, and into next. The communications can be customized with your company’s logo, a call to action, and your plan’s contact information.

In addition, we added a final “course” to last year’s colorful food-themed campaign, which also was designed to work beyond the first year. This final course is dessert...plan to enjoy retirement! Note that there is a separate user’s guide for the first three courses of the 2011 campaign; but the 2011 materials and the new “dessert course” are designed to be used together.



Flyer



Poster



Postcard



Postcard

HOWTO USE IT

The poster and postcard 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"
3. Right click your mouse and choose "Place Image"
4. 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

5. Once the logo is in the PDF, be sure to save your personalized version of the PDF!

To insert your plan's contact information:

- Simply double click on the Call to Action form box and you will be able to fill in the text that you want.

IDEAS FOR YOUR COMPANY'S 401(K) DAY

We've created a campaign that's 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.)
- **Delivery vehicles** — In addition to the materials provided, think about other ways you can create a buzz about the campaign, including:
 - Intranet
 - Company e-mail
 - 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. This year's food-for-thought theme is a great tie-in!
- **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 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.
- Watch for more ideas at www.401kday.org. We will share continually throughout the year.

Step 3: Implement your campaign

See the "How to use it" section for information on how to download and use the print materials. Consider adding some pizzazz to your campaign by:

- Offering doughnuts or other snacks to coincide with a mailing or event
- Creating a scavenger hunt that encourages employees to explore their retirement plan Web site
- Using balloons and arrow signs to highlight an event location.

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! kara@psca.org

