Enrollment meeting checklist

Use this checklist to prepare for a successful meeting that can help generate higher enrollment numbers.

Before the meeting

☐ Save the date

Set the date, time and location for your enrollment meeting with the plan sponsor.

Tip: *Hold the meeting during lunch. This time makes it convenient for employees to attend and allows you to reach more people.*

☐ Access the plan's educational website

Familiarize yourself with your client's plan features and options using their **customized educational website.** We'll send the website address to you via email, or you can request it by calling us at **(800) 421-9900**. You can also access the URL for the plan's website on the PartnerLink® site for PlanPremier® plans or the RecordkeeperDirect® sponsor site.

☐ Promote the meeting

Work with the plan sponsor on the best way to notify employees about the upcoming meeting.

Tip: *Our customizable* meeting poster *and* email invite *can help you and the sponsor spread the word.*

☐ Address meeting logistics

Work with the plan sponsor to arrange for any facilities you may need — a space with an electrical outlet, projection screen, internet access, etc.

Tip: *Ask about the meeting space. Will you be presenting in a conference room, a small break room or the floor of a manufacturing facility? How are the acoustics? Will you need a microphone?*

Tip: *Review* Plan and prepare for an enrollment meeting *for things to consider ahead of your meeting.*

☐ Create an agenda

With limited meeting time, an agenda can help you stay on track. Use our educational website guide to help you shape and share your presentation. Each plan's educational website is customized to reflect the plan's key benefits and other plan-specific information. Here are some ideas to consider:

- Ask the plan sponsor or HR representative to introduce you to the group, explain who you are and your role as the plan's financial professional.
- Introduce Capital Group as the plan's provider and share some background on the company and why the employer chose us.

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Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

- Play these short Enrollment videos to attract employee attention. They can help explain why employees should enroll and save in their employer's retirement plan.
  - PlanPremier: **English** | **Spanish**
  - RecordkeeperDirect: **English** | **Spanish**
- Cover two of the biggest concerns for participants: How much should I save? and How should I invest? You should cover what investment options are available in the plan and what happens if participants don't make an investment decision (e.g., contributions will be invested in the plan's default investment fund, which may be a target date fund).
- Direct participants to **ICanRetire.com**, available after they log into the participant site, for more help learning the ropes of saving for retirement.
- Allow time for a Q&A session at the end of the presentation.
- Ask the plan sponsor if you can offer your contact information to employees who may have more questions and want to speak with you one-on-one. This habit can result in additional ancillary business.

Tip: *You can conduct the meeting by walking employees through the highlights of the plan's customized website enrollment guides or just by having a simple and direct conversation. The location of your meeting, the time you have and the employees you're talking to may dictate your approach.*

☐ Practice your presentation

Use our **educational website guide** to shape your presentation. Then rehearse your presentation until you feel comfortable with the client's educational website and your delivery.

Tip: *Look for ways to make your presentation impactful yet brief.*

The day of the meeting

☐ Be prepared

Arrive at your meeting location early and have your presentation materials and resources ready to go. You may want to make yourself available after the meeting to answer questions.

Tip: *It's a good idea to have a backup plan in case you encounter technical difficulties with any devices that you plan to use during the presentation.*



Visit **capitalgroup.com/enrollment** to access many of these resources and more.

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