Educational website guide

Use this guide to lead an enrollment meeting using your client’s educational website.

GET STARTED →

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value. Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is contained in the fund prospectuses and summary prospectuses, which can be obtained from a financial professional and should be read carefully before investing.
Inspire saving.
Saving for retirement may not always seem easy but the reality is that you need to start planning now. Help inspire employees to get started by taking small steps toward their goals.

Highlight the plan benefits.
Help employees understand the value of their retirement plan by highlighting key features. These can include a company match, tax benefits and more.

Explain how to enroll.
Enrollment is an easy three-step process—and it’s even easier for PlanPremier® plans with Quick enroll or Auto enroll features. Give an overview of the process and then show employees where to enroll online or download enrollment forms.
Answer key investment questions. Walk employees through their plan options pages to help them learn about their investment options and determine how much they should save for retirement.

For PlanPremier plans that offer Quick enroll or Auto enroll, review their designated contribution rate and investment selection as well as any employer match or automatic contribution increase features.

Show the value of long-term results. Show employees where they can find detailed investment information. This can be a good opportunity to emphasize the importance of investing for the long term.

Answer common questions. Employees can quickly find answers to the most common enrollment questions with these plan-specific FAQs. You may want to address some of these questions during the presentation.

Layout the next steps. Enrollment is just the first step. From tracking savings to managing emotions, we provide tools and resources that can help employees along their journey to retirement.
9 **Address concerns.**

From “I probably can’t afford it” to “I might need my money in an emergency,” these articles address common enrollment roadblocks and help employees get started or stay on course toward their retirement goals.

10 **Offer support.**

Show employees who to contact when they have questions about their plan or need tips for preparing for a meeting with their plan’s financial professional.