



City of Anaheim

2023 CFP® Retention Campaign

www.missionsq.org/Anaheim-InTune

2024 NAGDCA Leadership Award

Nomination Award Category – Participant Education & Communication

Executive Summary

Plan Profile

MissionSquare Retirement has a CFP® professional model that allows participants of specific key client plans to have access to financial services. MissionSquare CERTIFIED FINANCIAL PLANNER™ professionals help participants save and plan now through retirement so they can pursue financial independence. They offer a personal consultation for financial guidance and to answer questions about a participant's finances. They also provide online and in-person seminars to reinforce MissionSquare's commitment of offering financial wellness tools and resources to help meet participants' education needs as they journey to and through retirement. MissionSquare positions this financial service in a way that shows participants that we are here for them throughout their retirement journey and thereafter. An overview of MissionSquare's financial planning services can be seen at www.missionsq.org/financialplanning.

Background Information

The City of Anaheim is a plan sponsor and custom key client of MissionSquare Retirement. For the City of Anaheim's Q4 communications campaign, their HR department wanted to focus on the retention of its employees in their Deferred Retirement Compensation Plan, especially those approaching retirement. In order for the City of Anaheim employees to realize the benefits of keeping their money with MissionSquare, it was key for them to retain their retirement accounts. In collaboration with MissionSquare Marketing, we proposed a communications campaign focused on education, financial tools, and relationships with a personal MissionSquare CFP® or retirement representative. This would help motivate Anaheim employees to stay in the retirement plan knowing that they have a wealth of resources and personal representatives at their disposal.

Strategy

To be more innovative and attractive to participants, MissionSquare used the theme of music through the decades and "Getting in Tune With Retirement" as the concept for the communications strategy. This was a Q4 campaign set to run right after the conclusion of National Retirement Security Month (October 2023) to keep the momentum going for Anaheim participants' engagement in their retirement. The communications strategy set the length of the campaign from November 1 to December 31 (two months). The target audience was Anaheim participants who were close to retirement: those aged 40+ with an account asset balance of \$40K and above. We especially wanted to highlight the MissionSquare financial resources for those approaching retirement and the access they have to their personal CFP® or retirement representative. The City aimed to integrate its wellness platform's point system, called Vitality Points, to enhance incentives for participants. Vitality Points are an internal rewards program for City of Anaheim employees who engage in activities that promote their financial health. After the completion of the campaign, MissionSquare reported those who accumulated the most Vitality Points to the client for the participants to win prizes.

See the microsite that includes the action items for participants to take: www.missionsq.org/anaheim-intune

In Their Own Words

"Financial wellness contributes to a healthier, more productive, and engaged workforce. Anaheim aims to help employees attain financial freedom and reach their retirement goals. Our "Get in Tune With Your Retirement" campaign targeted a specific population within the City, encouraging them to meet with a CFP® professional, boost contributions, consolidate external accounts, and attend financial webinars. This approach offered a fun and unique way to motivate employees to take tangible steps towards securing their retirement."

— Linda N Andral
Human Resources Director
City of Anaheim Deferred Compensation Plan

Written Justification

Project Description

We created a microsite, quiz, flyers, posters, postcard, banner, and emails based on the music theme to capture the target audience's attention. The microsite was interactive, with a video and unique visuals of the associated action items and had the ability for the audience to play music or take a financial planning quiz. The campaign's prepromotion started on Thursday, November 2, 2023, and featured a personalized email from the Anaheim retirement representative. The email was specifically aimed at Anaheim participants aged 40 and above with account balances over \$40,000. In the audience segmentation, we suppressed anyone already talking with their CFP® professional. Thereafter, emails were deployed bimonthly once the campaign officially commenced. We also mailed a postcard highlighting the campaign and sent the client flyers and posters that could be used for added promotion. Finally, we integrated promotions in our MissionSquare Anaheim website (banner, messaging). Top Vitality Point earners would win rewards based on their actions taken.

Marketing activities for the campaign included:

- Prepromotion email (Marketo and HTML versions).
- Four campaign emails (Marketo and HTML versions).
- Promotional postcard.
- Campaign flyers.
- Promotional posters.
- Campaign banner on www.missionsq.org/anaheim.
- Updated microsite, quiz, and video.

Goals

The objectives and action items for the City of Anaheim participants to take included:


- Logging in to their online account and the Financial Wellness Center.
- Updating their account information.
- Meeting with their MissionSquare CFP® professional.
- Setting up an appointment with their retirement representative.
- Increasing their contributions.
- Preventing rollouts from the MissionSquare Anaheim retirement plan.
- Increasing consolidation of external accounts to the MissionSquare Anaheim retirement plan.
- Signing up for CFP® seminars.
- Updating their beneficiaries.
- Improving savings, especially for those approaching retirement.

Significance

This campaign was necessary for retention purposes and making sure Anaheim employees and the plan sponsor stay with MissionSquare to and through retirement. The campaign was crucial so that participants were aware of their personalized MissionSquare resources, how to use them, and how to increase their savings for retirement. Using the theme of music during the decades of the 60's, 70's, 80's, and 90's brought back some nostalgia for participants as it helped garner attention and keep them engaged. Incorporating a video, music, visuals, and quiz helped with the interactivity of the campaign. The Vitality Points and the ability to win prizes incentivized participants to take part in their financial wellness and retirement plans. Overall, the campaign was successful in achieving the objectives and goals set out by MissionSquare Retirement and the City of Anaheim.

Please see samples of the campaign marketing materials and relevant results on the following pages.

Email Performance

|  | 3.7K | | 58.4% | | 3.5% | | |
|---|-------------------------|----------------|------------------|----------------|-------------------|----------------------|---------------------|
| | Delivered Emails | | Open Rate | | Click Rate | | |
| | Preview Week | Email 1 – 60's | Email 2 – 70's | Email 3 – 80's | Email 4 – 90's | Total Email Averages | Industry Benchmark* |
| Open Rate | 60.0% | 63.4% | 56.8% | 55.9% | 56.0% | 58.4% | 27.1% |
| Click Rate | 1.1% | 3.5% | 2.8% | 7.8% | 2.1% | 3.5% | 2.4% |
| Click-to-Open Rate | 1.8% | 5.5% | 4.9% | 13.9% | 3.8% | 6% | 10.1% |
| Unsubscribe Rate | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.2% |

*Campaign Monitor (Financial Institutions – 2023)

Microsite Usage

| | | |
|--|---|--|
| <p>532 Total Visitors</p> | <p>1,277 Total Opens</p> | <p>3,491 Total Page Views</p> |
| <p>3,707 Total Interaction Clicks</p> | <p>57% of Visitors Clicked an Action</p> | <p>420 Total Outbound Link Clicks</p> |

MissionSquare 1960s 1970s 1980s 1990s

CITY OF ANAHEIM PRESENTS
Get in Tune With Your Retirement

Schedule a Consultation
1960s R&B
Our CFP® professionals and Retirement Plans Specialist are here to help you with some financial moves to and through retirement. Right on!

Schedule a meeting:
[CFP® Professional](#) [Retirement Plans Specialist](#)

Earn up to 300 Vitality points after you meet with a financial planner (150 points) or Retirement Plans Specialist (150 points).

Popular Beats Through the Decades

- 1960s – Schedule a Consultation
- 1970s – Explore Online Tools
- 1980s – Make the Right Moves
- 1990s – Sign Up for a Webinar

Certified Financial Planner Board of Standards, Inc. (CFP Board) owns the CFP® certification mark in the U.S., which it authorizes use of by individuals who successfully complete CFP Board's initial and ongoing certification requirements.

Examples

MissionSquare RETIREMENT ANAHEIM

CITY OF ANAHEIM PRESENTS:
Get in Tune With Your Retirement

Dear First Name,

As your dedicated MissionSquare Retirement Plans Specialist, I want to make sure you know about the benefits of your City of Anaheim 457 Plan.

That's why I'm excited to announce a new campaign for City of Anaheim plan participants: Get in Tune With Your Retirement. Starting next week, you can join the campaign to help make sure you're among those in harmony with their retirement savings. Plus, you can earn up to **700 Vitality points!**

As always, you can meet with me one-on-one to talk about how your retirement savings plan can help you achieve your goals.

Schedule a Meeting

For over 50 years, MissionSquare Retirement has been dedicated to helping public service employees achieve financial security. Thank you for your service to your community and for choosing MissionSquare Retirement.

I'm proud to serve you.

Ryan Carpenter
Retirement Plans Specialist
(202) 759-7032
RCarpenter@missionsq.org

If you don't want to receive any emails from MissionSquare Retirement, you can [opt out](#) of our communications at any time. Unsubscribing won't affect email communications you've specifically requested, such as eDelivery of account statements and transaction confirmations.

MissionSquare Retirement
777 North Capital Street, NE
Washington, DC 20002-4240
www.missionsq.org/anaheim
Ethics Policy

MissionSquare RETIREMENT ANAHEIM

GET IN TUNE WITH YOUR RETIREMENT
Meet With a Financial Planner

Dear First Name,

In a recent report, 77% of public service workers agreed they should be saving more for retirement.*

Your City of Anaheim 457 Plan can help.

Join your new campaign Get in Tune With Your Retirement to learn more about your 457 plan benefits, starting with a 1:1 meeting with a MissionSquare Retirement CFP® professional.

Schedule a Meeting

Plus, earn up to 300 Vitality points after you meet with a financial planner (150 points) or Retirement Plans Specialist (150 points). Act quickly! The deadline is December 31, 2023.

We're here to help you each step of the way. MissionSquare Retirement

*MissionSquare Research Institute, 25 April 2022. In: Do Public Service Workers Save? (Boston Globe and Wall Street Journal).
Certified Financial Planner Board of Standards, Inc. (CFP Board) sets the CFP® certification exam in the U.S., which is a minimum use of IP. Individuals who successfully complete CFP Board's initial and ongoing certification requirements.

If you don't want to receive any emails from MissionSquare Retirement, you can [opt out](#) of our communications at any time. Unsubscribing won't affect email communications you've specifically requested, such as eDelivery of account statements and transaction confirmations.

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MissionSquare RETIREMENT ANAHEIM

GET IN TUNE WITH YOUR RETIREMENT
Explore Online Tools

Dear First Name,

Are you aware of all the benefits you get from your City of Anaheim 457 Plan?

Your City of Anaheim Get in Tune With Your Retirement campaign features out-of-sight online tools you can access in the MissionSquare Retirement Financial Wellness Center. Log in to use the tools focused on retirement, managing debt, college savings, and more.

Explore the Tools

Visit the Financial Wellness Center and earn 50 Vitality points. Act today! The deadline is December 31, 2023.

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MissionSquare RETIREMENT ANAHEIM

GET IN TUNE WITH YOUR RETIREMENT
Take the Retirement Quiz

Dear First Name,

Do you know about the total read benefits of your 457 plan?

The City of Anaheim Get in Tune With Your Retirement campaign has a bodacious quiz to test your financial knowledge — with two bonus pop culture questions!

Take the Quiz

Answer all six questions to receive 60 Vitality points. Plus, earn an extra 50 points when you update your beneficiaries. Act quickly! The deadline is December 31, 2023.

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MissionSquare RETIREMENT ANAHEIM

GET IN TUNE WITH YOUR RETIREMENT
Sign Up for a Webinar

Dear First Name,

Don't miss out on financial planning webinars covering awesome topics — from saving and investing to estate planning and college savings.

The webinars, led by MissionSquare Retirement CFP® professionals, are a benefit in your City of Anaheim 457 Plan.

Sign Up Today

As part of your City of Anaheim Get in Tune With Your Retirement campaign, attend any webinar and earn 240 Vitality points. Act today! The deadline is December 31, 2023.

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Emails

MissionSquare RETIREMENT ANAHEIM

CITY OF ANAHEIM PRESENTS
Get in Tune With Your Retirement

Just as music evolves, so do your retirement planning needs.

Take a spin through the decades while you learn about your **City of Anaheim 457 Plan!**

| | | | |
|--|---|---|---|
| 1960s: BBQ Schedule a 1:1 meeting for some soulful planning. Right on! | 1970s: Disco Explore out-of-sight online tools. Can you dig it? | 1980s: Pop Take our bodacious quiz to test your financial knowledge. Study out! | 1990s: Hip-Hop Sign up for a webinar. It's all that and a bag of chips! |
|--|---|---|---|

Join our campaign and earn up to **700 Vitality points!**

Visit www.missionsq.org/anaheim-ittune to get started. Act quickly! Deadline is December 31, 2023.

MissionSquare RETIREMENT ANAHEIM

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Get in Tune With Your Retirement

Take a spin through the decades, learn about your 457 plan, and earn Vitality points!

MissionSquare RETIREMENT ANAHEIM

CITY OF ANAHEIM PRESENTS
Get in Tune With Your Retirement

77% of public service workers agree they should be saving more for retirement.*

Your City of Anaheim 457 Plan can help.

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Flyer, Poster, Web Banner, and Postcard

370+

Participants logged in to their Financial Wellness Center

70+

CFP® webinar registrations

120+

Appointments with a MissionSquare retirement representative or CFP®

130+

Retirement quiz completions

390+

Participants updated their beneficiaries

830+

Employees participated in the campaign

*Results from Nov. 1, 2023, to Dec. 31, 2023, based on the City of Anaheim participants aged 40+ and \$40K+ in assets.