

Employee communication timeline

for [insert Plan Name]

Transition period (Optional)—

Type of communication	Audience	Distribution Date	Notes
New Provider Email	All employees	[Insert date]	Email
Transition FAQ Brochure	All employees	[Insert date]	PDF - Email or post on intranet
Enrollment Poster	All employees	[Insert date]	Printed - Hanging in hallways, etc.
Save the Date Email	All employees	[Insert date]	Email - To promote meeting(s)
Enrollment Meeting(s)/Webinar(s)	All interested employees	[Insert date]	Meeting
Enrollment Kit/Overview	All employees	[Insert date]	Printed
Advocate Training	HR reps, site managers, etc.	[Insert date]	Meeting - Prepare team to reinforce key messages

Goal: Increase participation

Timing	Type of communication	Audience	Distribution Date	Notes
Year 1 – Q1	Welcome Email	Newly eligible employees	[Insert date]	Email
Year 1 – Q2	Start Today Mailer	All eligible employees	[Insert date]	Printed
Year 1 – Q3	Retirement 101 poster	All employees	[Insert date]	Printed - Hanging in break rooms, hallways, etc.
Year 1 – Q4	Enrollment Options Email	All eligible employees	[Insert date]	Email
Each quarter	Participant Statements	All participants	[Insert date]	Sent from OneAmerica

Goal: Increase deferrals

Timing	Type of communication	Audience	Distribution Date	Notes
Year 1 – Q1	Match Email	All employees	[Insert date]	Email
Year 1 – Q2	Contribute More Flyer	All participants	[Insert date]	PDF - Email or post on intranet
Year 1 – Q3	Consolidation Email	All participants	[Insert date]	Email
Year 1 – Q4	Tax Deferral Email	All employees	[Insert date]	Email
Each quarter	Participant Statements	All participants	[Insert date]	Sent from OneAmerica

Goal: General awareness

Timing	Type of communication	Audience	Distribution Date	Notes
Year 1 – Q1	Avoiding Roadblocks Email	All employees	[Insert date]	Email
Year 1 – Q2	Save the Date Email	All employees	[Insert date]	Email - To promote meeting
	Retirement Basics Seminar	All employees	[Insert date]	Meeting
Year 1 – Q3	Web Tools Email	All employees	[Insert date]	Email
Year 1 – Q4	Retirement Basics Brochure	All employees	[Insert date]	Printed
Each quarter	Participant Statements	All participants	[Insert date]	Sent from OneAmerica

Goal: Investing education

Timing	Type of communication	Audience	Distribution Date	Notes
Year 1 – Q1	Asset Allocation Builder Brochure	All employees	[Insert date]	Printed
Year 1 – Q2	Save the Date Email	All employees	[Insert date]	Email - To promote meeting
	Investing Basics Seminar	All employees	[Insert date]	Meeting
Year 1 – Q3	Interest Rates and Inflation Email	All employees	[Insert date]	Email
Year 1 – Q4	Online Asset Allocation Tool Email	All employees	[Insert date]	Email
Year 2 – Q1	Investing Basics Brochure	All employees	[Insert date]	Printed
Year 2 – Q2	Market Volatility Brochure	All employees	[Insert date]	PDF – Email or post on intranet
Each quarter	Participant Statements	All participants	[Insert date]	Sent from OneAmerica

Goal: Personal finance education

Timing	Type of communication	Audience	Distribution Date	Notes
Year 1 – Q1	Setting Goals Brochure	All employees	[Insert date]	Printed
Year 1 – Q2	Save the Date Email	All employees	[Insert date]	Email - To promote meeting
	Managing Debt Seminar	All employees	[Insert date]	Meeting
	Household Budget Worksheet	Employees who attend seminar	[Insert date]	PDF - Email or post on intranet afterward
Year 1 – Q3	College Savings Email	Applicable employees	[Insert date]	Email
Year 1 – Q4	Saver's Tax Credit Flyer	Employees that may qualify	[Insert date]	PDF - Email or post on



				intranet
Year 2 – Q1	Estate Planning Email	Employees over 50	[Insert date]	Email
Year 2 – Q2	Managing Debt Email	All employees	[Insert date]	Email
Each quarter	Participant Statements	All participants	[Insert date]	Sent from OneAmerica

Goal: Nearing retirement education

Timing	Type of communication	Audience	Distribution Date	Notes
Year 1 – Q1	Catch-Up Contributions Flyer	Employees age 55 and over	[Insert date]	PDF – Email or post on intranet
Year 1 – Q2	Save the Date Email	All employees	[Insert date]	Email - To promote meeting
	Nearing Retirement Seminar	All interested employees	[Insert date]	Meeting
Year 1 – Q3	Investing During Retirement Email	Employees over 55	[Insert date]	Email
Year 1 – Q4	Retirement Budget Worksheet	Employees over 55	[Insert date]	PDF – Email or post on intranet
Year 2 – Q1	Distribution Options Flyer	Employees over 55	[Insert date]	Printed
Year 2 – Q2	Making Retirement Assets Last Email	Employees over 55	[Insert date]	Email
Each quarter	Participant Statements	All participants	[Insert date]	Sent from OneAmerica



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One American Square, P.O. Box 368 | Indianapolis, IN 46206-0368 | (317) 285-1877 | www.oneamerica.com