


I first realized I needed to **start saving for retirement** around age 25 when I attended a presentation about investing.


My advice, **START NOW, save MORE and KEEP saving.**



Veteran, World Traveler and TSERS Member



Start Early. Save Often.



I didn't give retirement much thought until I was in my late 30s to early 40s.

**I am doing what I can now.**

Member, TSERS



**Fresh Look on Savings & Security**



**"I put aside money every pay period and enough to get my full employer match."**




Start Early. Save Often.



I knew that if I wanted my **retirement** to be filled with **comfort and happiness,** I needed to start taking **saving seriously.'**



- Member, TSERS



**Fresh Look on Savings & Security**



**"I realized I needed to start saving for retirement when I finished school and got my first full-time job."**



Member, Local Governmental Employees' Retirement System



Start Early. Save Often.



**"I would definitely tell my younger self to start saving for retirement in my 20s."**



North Carolina Teacher and TSERS Member



Start Early. Save Often.



I would tell my younger self to **save at least 20%, start as early as possible, live within your means, stay out of debt.**



Member, LGERS



Start Early. Save Often.



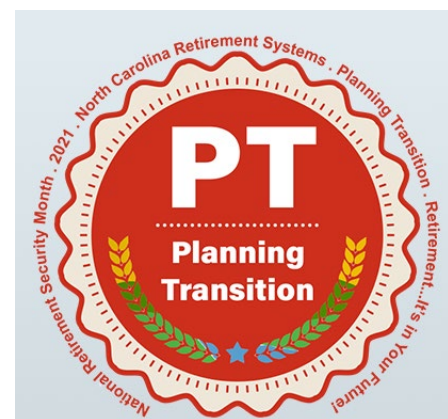
**"I waited several years to start saving for retirement. I wish I had started earlier."**



Member, LGERS



**Fresh Look on Savings & Security**

# Communications 2022



**North Carolina**  
Total Retirement Plans  
401k | 457 | 403b



*Dale R. Folwell, CPA*  
STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

# 2021 in Review What We Set Out To Do

## ENGAGE

Transform Delivery through  
refreshed creative and digital content



# 17%

increase in virtual  
engagements

**Milestone engagements**  
through social media



With retirement on the horizon, before you think about taking money out of your 401(k) or 457 Plan(s), check out the [Cost Comparison Document](#). This tool compares costs to help you make an informed decision, because the NC Plans are competitively priced.

Instead of withdrawing your assets from the plan(s), here are some other options you may want to consider:

## EDUCATE

Employer Education Program  
Introduce new tools and resources to participants



### Employer-Focus

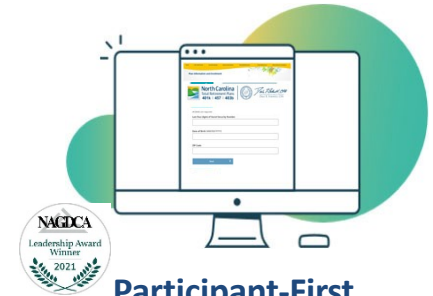
Delivering Plan Information for  
Better Administration  
<https://ncplans.retirepru.com/employer.html>

### Participant-Focus

New Web Resources, Animations  
Events Webpage  
Quarterly Signature Newsletters

## EMPOWER

Activate outcomes in  
participation and asset retention



### Participant-First

Driving Enrollment Outcomes through  
the Online Digital Experience  
<https://ncplans.retirepru.com/enrollment.html>

Enrollments through Oct. 2021 have  
exceeded the annual total in 2020 & are  
approaching pre-pandemic levels



# 2021 in Review – Where we are Now



**276,406**

TOTAL UNIQUE VISITORS\*

**18% increase**

in total unique visitors

<https://ncplans.retirepru.com/>

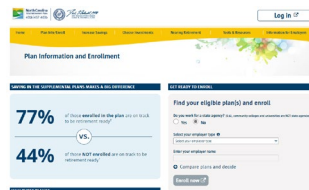


**7.44**

Average Session  
(minutes & seconds)

## Webpage Engagement

Top 4 webpages in 2021



**Up 65%**

46,859 visits

Plan Information & Enrollment webpage

<https://ncplans.retirepru.com/enrollment.html>

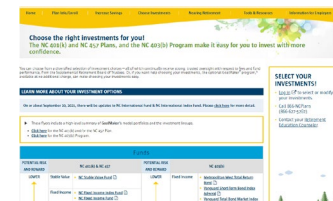


**Up 16%**

12,922 visits

The Tools You Need to Plan for Your Future

<https://ncplans.retirepru.com/tools.html>

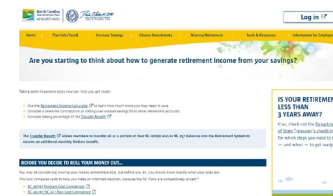


**Up 48%**

10,124 visits

The Tools You Need to Plan for Your Future

<https://ncplans.retirepru.com/investments.html>



**Up 78%**

7,716 visits

Are you starting to think about how to generate retirement income from your savings?

<https://ncplans.retirepru.com/nearing-retirement.html>



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DALE R. FOLWELL, CPA

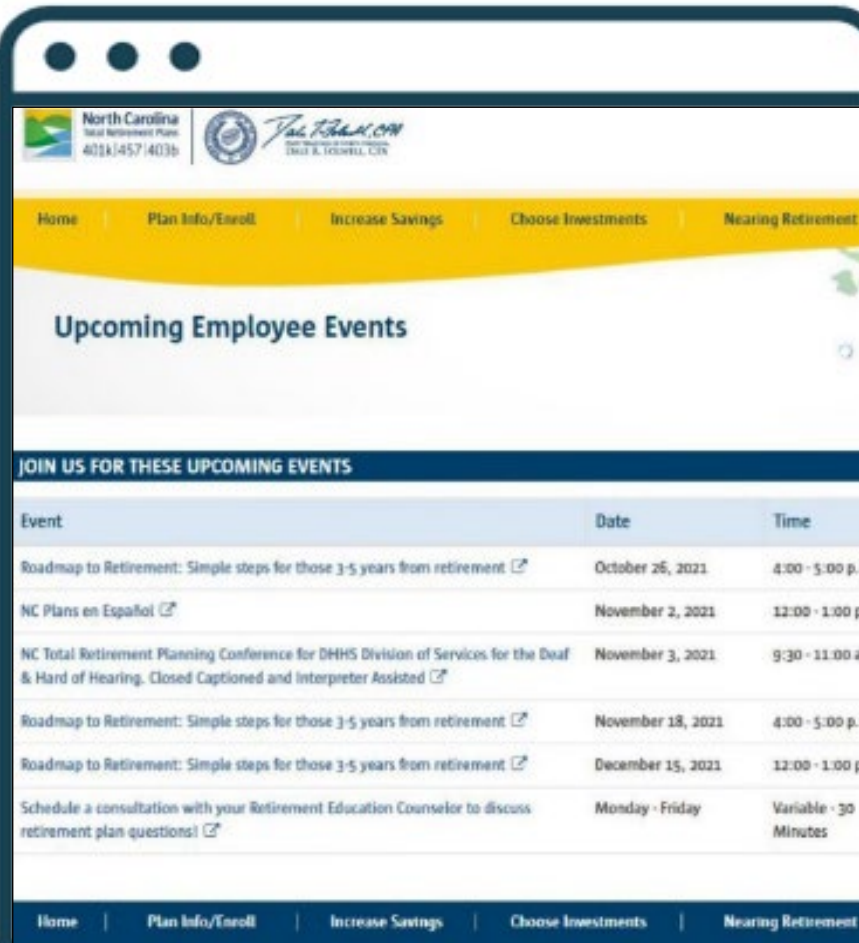
## Employers

Employers who offer a match is **65% higher** than those employers that don't

420 unique employers participated in educational webinars

High levels of engagement on employer education page

<https://ncplans.retirepru.com/employer.html>



The screenshot shows the website for North Carolina Total Retirement Plans. The header includes the state logo, the text 'North Carolina Total Retirement Plans 401k | 457 | 403b', and the signature of Dale R. Folwell, CPA. A navigation bar contains links: Home, Plan Info/Enroll, Increase Savings, Choose Investments, and Nearing Retirement. The main content area is titled 'Upcoming Employee Events'. Below this is a section 'JOIN US FOR THESE UPCOMING EVENTS' followed by a table of events.

| Event   | Date              | Time                  |
|---|-------------------|-----------------------|
| Roadmap to Retirement: Simple steps for those 3-5 years from retirement   | October 26, 2021  | 4:00 - 5:00 p.m.      |
| NC Plans en Español   | November 2, 2021  | 12:00 - 1:00 p.m.     |
| NC Total Retirement Planning Conference for DHHS Division of Services for the Deaf & Hard of Hearing. Closed Captioned and Interpreter Assisted | November 3, 2021  | 9:30 - 11:00 a.m.     |
| Roadmap to Retirement: Simple steps for those 3-5 years from retirement   | November 18, 2021 | 4:00 - 5:00 p.m.      |
| Roadmap to Retirement: Simple steps for those 3-5 years from retirement   | December 15, 2021 | 12:00 - 1:00 p.m.     |
| Schedule a consultation with your Retirement Education Counselor to discuss retirement plan questions!  | Monday - Friday   | Variable - 30 Minutes |

The footer of the website also contains the same navigation links: Home, Plan Info/Enroll, Increase Savings, Choose Investments, and Nearing Retirement.

## Employee Participants

New resources for Employees on the main website, including an Events Page with tailored, virtual sessions

17% increase of individual meetings

64% increase in enrollments

## Employer & Participant Engagement & Education



North Carolina  
Total Retirement Plans  
401k | 457 | 403b



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STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA



2021 Leadership Award for National Retirement Security Month - North Carolina Enrollment Campaign

2021 Leadership Award Technology & Interactive Media – North Carolina Enrollment Campaign



**Treasurer Folwell, the Supplemental Retirement Board of Trustees & staff** were recognized with two Leadership Awards in the categories of “Technology and Interactive Media” and “National Retirement Security Month.” We were also nominated as one of four finalists for NAGDCA’s prestigious Art Caple President’s Award.



## October is National Retirement Security Month

**9,000 +**  
Member engagements  
through virtual events

**Events +**  
Scheduled events maxed  
out already increased  
attendance levels & new  
events added

**Enrollments +**  
October had the highest  
level of enrollment  
numbers in 7 years

# Communications 2022



**North Carolina**  
Total Retirement Plans  
401k



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STATE TREASURER OF NORTH CAROLINA  
DALE R. FOLWELL, CPA

**Performance HIGH**

**Costs LOW**





## 2022 - Goals



Increase Plan adoptions and employee participation



Increase savings contributions



Increase asset retention



Increase effectiveness and efficiency of communications



## ENGAGE

Continue to transform Delivery through refreshed creative and digital content



**Refresh Messaging  
& Channels**



## EDUCATE

Employer Education Program  
Introduce new tools and resources to participants



Start Earlier with Nearing Retirement Messaging

**Targeted  
Webinar Programs**

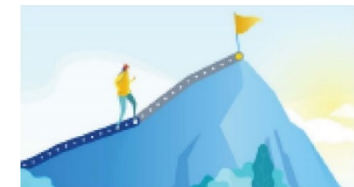


## EMPOWER

Activate outcomes in participation and asset retention



Encourage Ongoing Asset Growth & Retention



Launching  
**MyRock Tool**



# Questions



# Thank you



**PERSON**

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# Appendix

## Social Media & Communications

# Social Media

In this video, North Carolina State Treasurer Dale R. Folwell, CPA, shares an important message with our members and participants about the North Carolina Supplemental Retirement Plans.



<https://www.youtube.com/watch?v=heUfvKOM0Eo>



THE NORTH CAROLINA SUPPLEMENTAL RETIREMENT PLANS TEAM

# Retirement

It's Coming for You



PG

The Future is in Your Hands

North Carolina  
Total Retirement Plans  
401k

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DALE R. FOLWELL, CPA

Performance HIGH

Costs LOW



Happy 401(k) Day

Social Media

North Carolina  
Total Retirement Plans  
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Take Time to FOCUS on the Future.

It's YOUR Retirement!



myNCRetirement.com and ORBIT



## myNCRetirement Checklist July 2021



### Retirement...It's in Your Future.

No matter where you are in your career, one thing is certain, **#myNCRetirement is in your future.** Take time to **learn about your benefits** and savings options and take advantage of the resources available to you as a public servant in the state of North Carolina. **Visit myNCRetirement.com.**



### Assess Your Retirement Numbers.

It is recommended that you have 80% of your pre-retirement income in retirement. **Are you on track?** Participate in one of our live or on-demand webinars to find out how you can be 'Retirement Ready' when the time comes.



### Enroll in the NC Supplemental Retirement Plans.

**Exclusively available** to those who serve the citizens of North Carolina, the NC Supplemental Retirement Plans (NC 401(k) and NC 457 Plans, and the NC 403(b) Program) offer valuable options to save for retirement. And NOW, you can complete the entire enrollment process online. Visit [NCPlans.retirepru.com/enrollment.html](https://ncplans.retirepru.com/enrollment.html), learn about the Plans offered by your employer, and **discover the tools** and **one-on-one support** available exclusively to you as a participant.

## NC Plans - There's just No Comparison



Outstanding Achievement in  
Technology and Interactive Media



Outstanding National Retirement  
Security Month Campaign



I would tell my younger self to  
**Save as early  
as you can and as  
much as you can.**  
  
**Let time and  
compounding  
work for you.**

Member, LGBRS



Start Early. Save Often.



**I realized  
I needed to  
save for  
retirement  
a few years  
into employment  
and I feel like I am on the right track.**



15-Year Member, Teachers' and State Employees' Retirement System (TSERS)



## Social Media



North Carolina  
Total Retirement Plans  
401k | 457 | 403b



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