2023 in Review: What we set out to do

**ENGAGE**
Continue to transform Delivery through refreshed creative and digital content

- Rebranding of Communication Assets
- TOP 3 REASONS FOR JEWELERS TO DEVELOP A RETIREMENT PLAN
- TOP 3 REASONS WHY EMPLOYEES ARE INTERESTED IN RETIREMENT
- The 3 steps toward plan awareness among employees

**EDUCATE**
Employer Education Program
Introduce new tools and resources to participants

- Webinars & Quarterly Themes
- Targeted Campaigns
  - Keeping Money in the Plans
  - Enrollments

**EMPOWER**
Activate outcomes in participation and asset retention

- Facilitate Ongoing Asset Growth & Retention
- Prepare Employers and Participants for 2024 Platform Migration

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North Carolina Total Retirement Plans
401k | 457
Employer-Focus

Employer Contribution Outreach
Employer Retirement Monitor
Dedicated Webinars

Meetings

33% Increase
in group, participant and employer meetings
50% Increase
In group meeting attendance

Nearing Retirement Email
2,647 Emails Sent*
56% Open Rate

Participant-Focus

Nearing Retirement Email Campaign
Beneficiary Electing Beneficiary Email Campaign
Quarterly Newsletters
Social Media Campaigns

Beneficiary Campaign
481 Emails
549 Postcards
89 Beneficiaries Took Action

*As of 9/30/2023

New record high of
552 Enhanced
Employer Contributions*

2023 in Review: Where we are now
### 2023 in Review: Where we are now

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<th>myNCPlans.com Webpage</th>
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**286,825 Total Unique Visitors**

*As of 9/30/2023. Unique visitors are unduplicated visitors as identified by IP address.*
Communications 2024

SABING IN THE SUPPLEMENTAL PLANS MAKES A BIG DIFFERENCE

77% of those enrolled in the plan are on track to be retirement ready

52% of those NOT enrolled are on track to be retirement ready

myNCPlans.com
2024 Goals

- Increase Plan adoptions and employee participation
- Increase savings contributions
- Increase asset retention
- Increase effectiveness and efficiency of communications
**2024 Goals**

**LISTEN**
- Survey & Communication Channels
- Increase Value Awareness
- Increase Loyalty

**LEAD**
- Expanded Webinars & Targeted Audiences
- Short-Form Storytelling & On-Demand Presentations

**LEVERAGE**
- Employer Actions & Communications
- Hybrid Consultations

**LAUNCH**
- Facilitate Ongoing Asset Growth & Retention
- Target & Specific Campaigns
Thank you

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3200 Atlantic Avenue, Raleigh, NC 27604
Don’t let TIME take a BITE out of your RETIREMENT INCOME!
Social Media

Say yes to retirement readiness!

planning and preparation make retirement a little sweeter
North Carolina Supplemental Retirement Plans Receives Leadership Award for National Retirement Security Month Campaign

The Department of State Treasurer is committed to encouraging individuals to prioritize, plan and stay motivated as they move toward retirement, and its efforts have been recognized with a prestigious award. It happens far too often that someone on the verge of retirement realizes the consequences of not saving enough. This year, we asked the Legislature to consider a $25 monthly match for state employees.

State Treasurer Dale R. Folwell, CPA, the Supplemental Retirement Board of Trustees (Board) and staff have been recognized by the National Association of Government Defined Contribution Administrators (NAGDCA) with a Leadership Award for their National Retirement Security Month Campaign – myNCRetirement Journey.

NAGDCA’s annual Leadership Awards recognize the brightest ideas and most innovative solutions from across the public-sector defined contribution industry. National Retirement Security Month (NRSM) is celebrated each October and raises the importance of saving for retirement.

The NC 401(k) and NC 457 Plans are exclusively available to public servants in the state of North Carolina. The myNCRetirement Journey campaign sourced information from state and local governmental employees through a NRSM survey, implemented a robust social media campaign and hosted exclusive events to inform, educate and engage current and future participants.

“The results of the campaign were extraordinary. For October 2022 when compared with other months in the year, there was a 95% increase in event attendance, 71% increase in social media and digital engagement and an impressive 194% increase in visits to the enrollment webpage. These culminated in record-setting participant actions through enrollments and increasing contributions. “The innovative execution of this campaign by our communications staff serves to highlight the North Carolina Retirement Systems Division as we continue to educate current and future public servants,” said Treasurer Folwell.

“We can and should do more. This year, we asked the Legislature to consider a $25 monthly match for all state employees and teachers to promote retirement readiness. It only takes a small incentive to start the ball rolling. This match could help close the 50% gap between state employees’ and local employees’ participation rates. Let’s help state employees and teachers become a leader in their future retirement.”

Previously, NC Plans has been recognized with 15 Leadership Awards for Plan Design and Administration (2020, 2019, 2017, 2016, 2014, 2012, 2011); Technology and Interactive Media (2021); Participant Education and Effective Communication (2016), Excellence in 403(b) Plans (2015); National Save for Retirement Week/Month (2021, 2015, 2014, 2013, 2011); as well as a special recognition for the design and implementation of a Public Employees Online Survey.

North Carolina’s Supplemental Retirement Plans (NC 401(k) and NC 457 Plans) are among the largest and lowest-cost public plans in the country. The plans are administered by the N.C. Department of State Treasurer and the Supplemental Retirement Board of Trustees, and offered by more than 1,100 public employers, including state agencies, local governments, school districts and community colleges.

The N.C. Department of State Treasurer is also responsible for managing one of the largest pensions in the United States as well as other funds, with assets of over $115 billion as of Aug. 4. For more information see NCPlans.