Empowering employees through education

Equitable has a plan

EQUITABLE

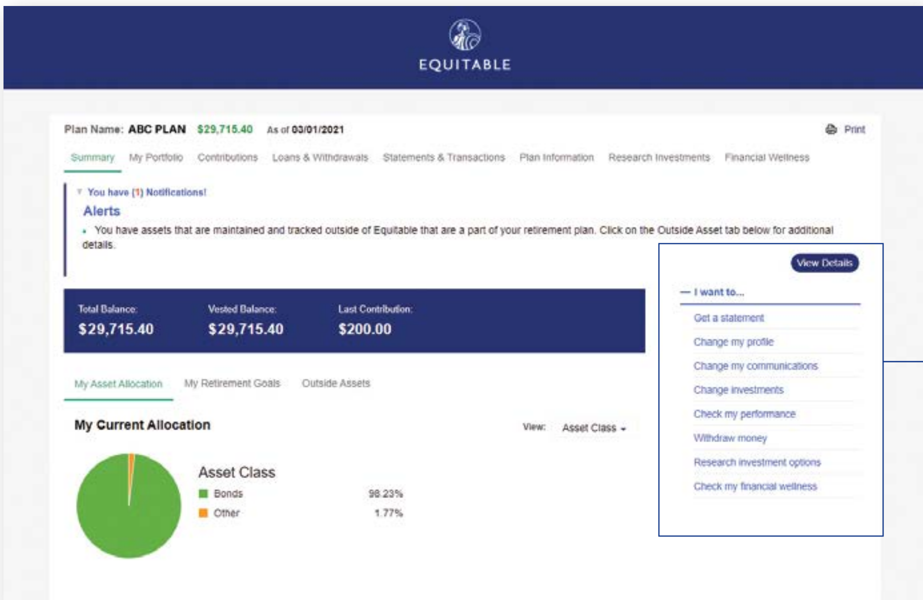
What are your employees' retirement income goals?

Offering a retirement plan for your employees is an important step in helping them become retirement-ready. At Equitable, we believe through effective education, we can guide your employees through each stage of their career — whether they're just starting out, juggling the demands of mid-life, transitioning to their next act or defining their legacy. From informative educational articles, interactive calculators and ongoing seminars, your employees will have a suite of materials tailored to their common retirement questions.

1 EBRI/Greenwald, 2021 Retirement Confidence Survey.

Financial wellness begins with a retirement plan

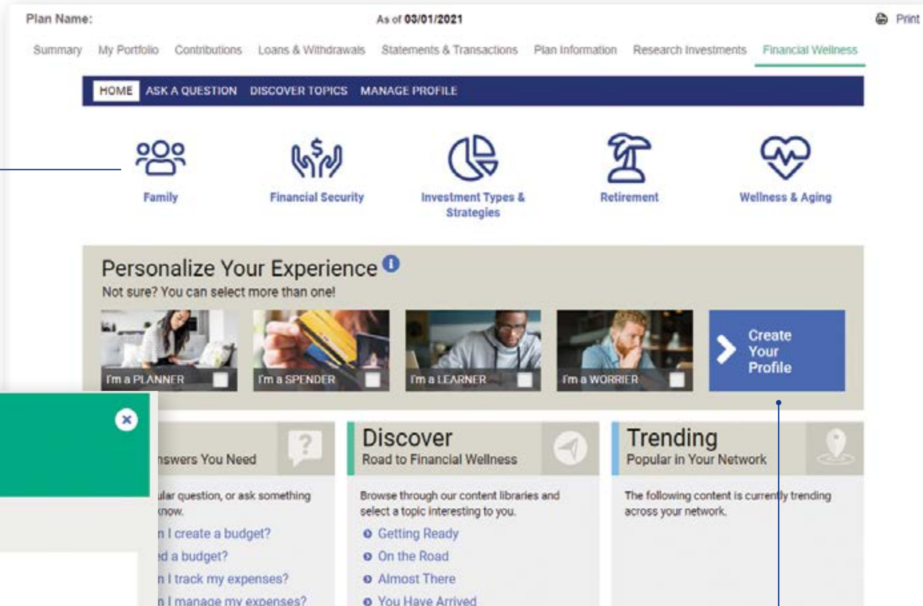
Your employees will have access to personalized wellness and educational topics, covering a full breadth of lifestyle stages, as well as online digital tools, giving them a clear picture of what means the most to them and discovering a path to the future they've envisioned.

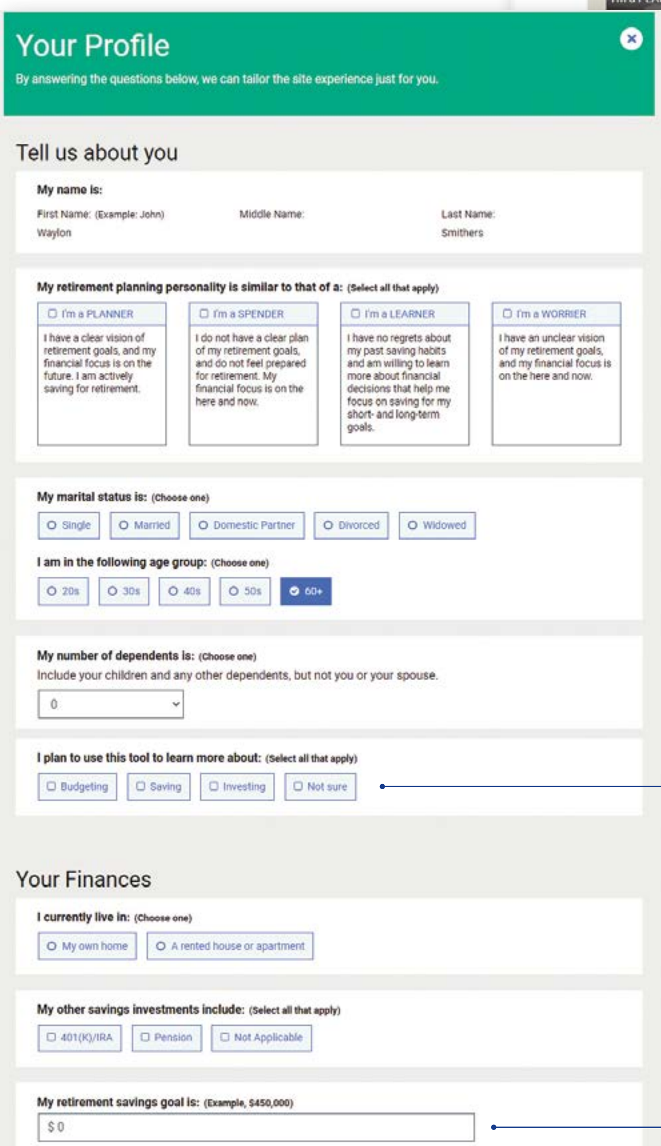


An overview of their account and a navigation bar to quickly take them to the most frequently visited sections of the website.

Personalizing the experience

On the financial wellness home page, employees have the option to select a category of interest to them.





What retirement planning personality resonates with your employees? They can select from one or more of the options listed here to create their profiles or simply click on Create Your Profile to get started.

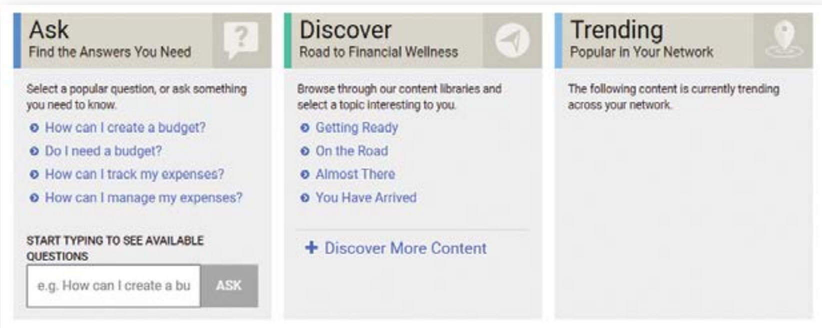
By answering a few short questions about themselves and their current financial situation, the financial wellness center will be customized with topics most important and relevant to each employee.

Key topics of interest

Retirement savings goal

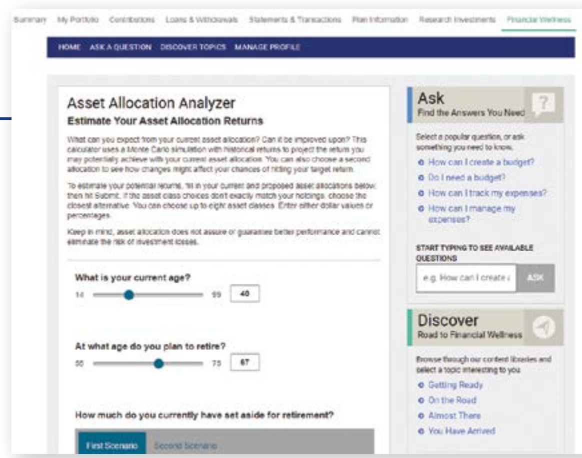
Quick questions, quick answers

Whether it is selecting one of the frequently asked questions or visiting a breadth of topics in the content library, the site is designed to give your employees a choice, allowing them to customize their experience.



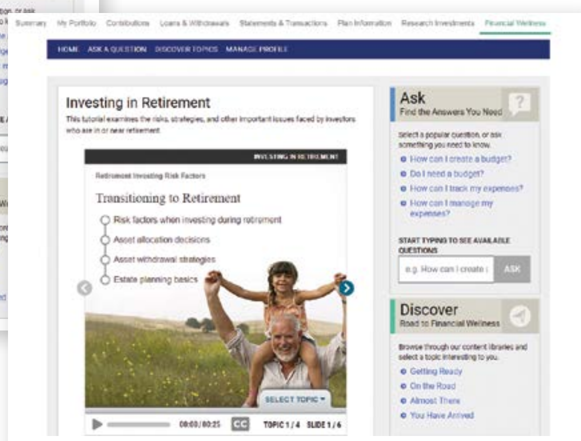
Library of learning

There is a host of content in a variety of formats: videos, calculators, tutorials and educational articles to help your employees learn about financial topics that are most important to them in a digestible manner.



Interactive calculator

Video



Tutorial

Your dedicated retirement plan consultant (RPC)

To help you achieve retirement plan success, we have a team of dedicated knowledgeable professionals who can assist you with:

- Fiduciary education
- Educating employees about retirement plan basics
- Increasing participation and deferral rates
- Local point of contact

From the initial enrollment meeting to future ongoing enrollment meetings and seminars, your RPC is available to assist. In addition, our employee education program features a series of educational emails easily delivered to your employees.

To take advantage, it's as simple as providing us with employee email addresses.

We take care of the rest.

Ongoing employee education

To keep your employees well-informed, we offer a series of educational seminars, articles and emails no matter what stage of their career.

We have a series of seminars featuring the following topics:

- **Preparing for retirement**
- **Asset allocation — understanding market volatility**

Our emails provide education on the benefits of saving for retirement, asset allocation and the power of compounding over time.

- **Increasing contributions**
- **Retirement myths and realities**
- **Preparing for a comfortable retirement (enrollment)**
- **Understanding your investments**
- **Managing your account online**
- **Financial fundamentals**

Each seminar features real-life examples in easy-to-understand language. In addition, we provide an attendance sheet and seminar evaluation form.

For more information about how Equitable can help your employees with retirement education, contact us at (800) 528-0204 or visit equitable.com/retirement.

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