

2022 Q3 - Marketing Update



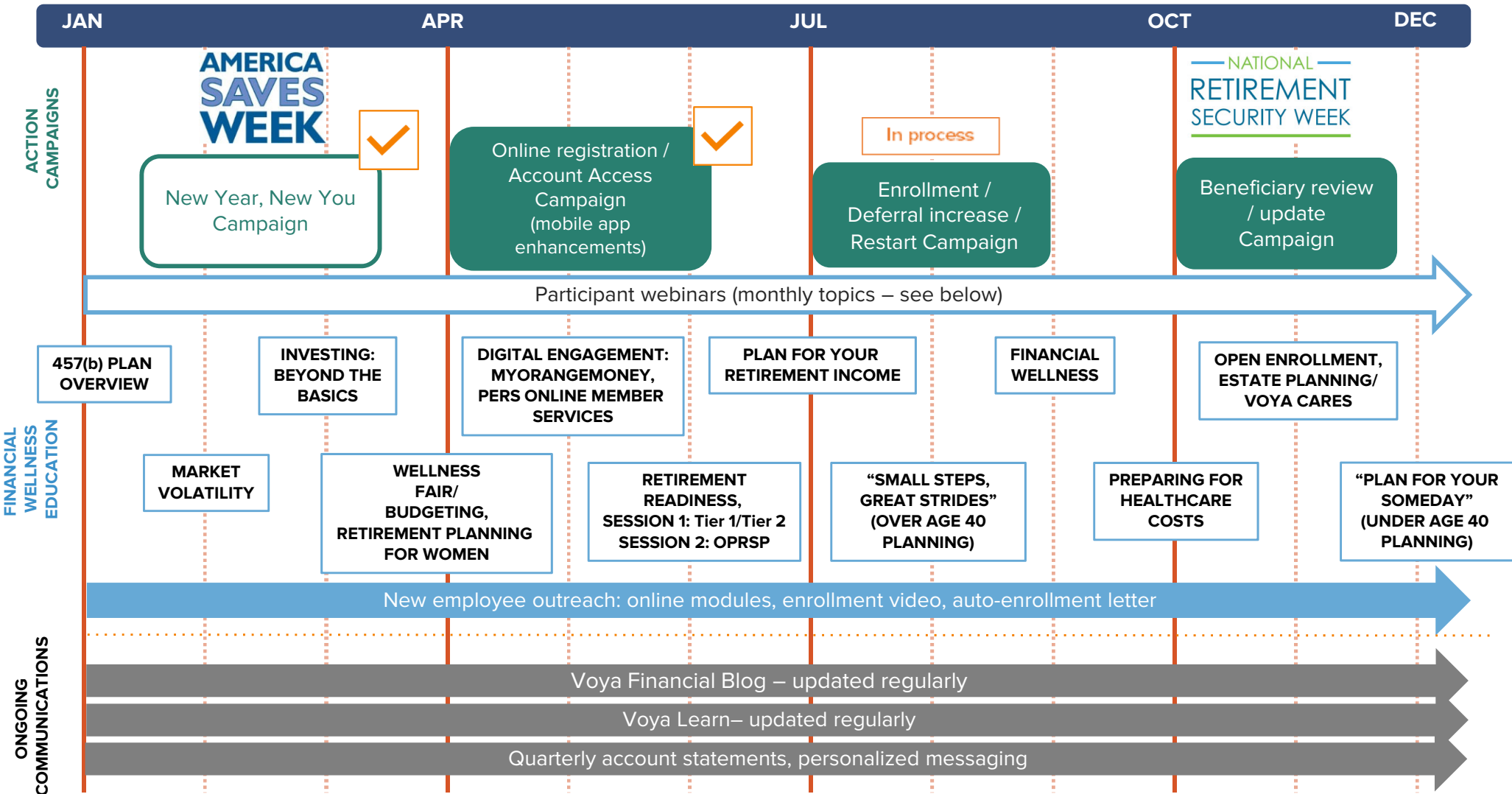
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Digital participant experience calendar



COLA email campaign

- Increase Deferral Amount html: deployed 7/13/22
- Restart Contribution html: deployed 7/13/22

Clackamas County – Increase Deferral Amount html



July 13, 2022

Targeted Age group	Sent	Delivered	Total opens*
20-29	97	89	98
30-49	714	699	740
50+	352	337	356

*Total opens is cumulative.

Clackamas County – Increase Deferral Amount html

Deployment metrics

Targeted Age Group	Delivered	Unique opens		
		Total	Desktop	Mobile
20-29	89	49 (55.06%)	45 (91.84%)	4 (8.16%)
30-49	699	440 (62.95%)	409 (92.95%)	31 (7.05%)
50+	337	213 (63.20%)	199 (93.43%)	14 (6.57%)

Hyperlinks clicked

Click Activity	Targeted Age Group		
	20-29	30-49	50+
Make changes online	0	5 / 440 (1.14%)	6 / 213 (2.82%)
clackamas.beready2retire.com	0	1 / 440 (0.23%)	3 / 213 (1.41%)

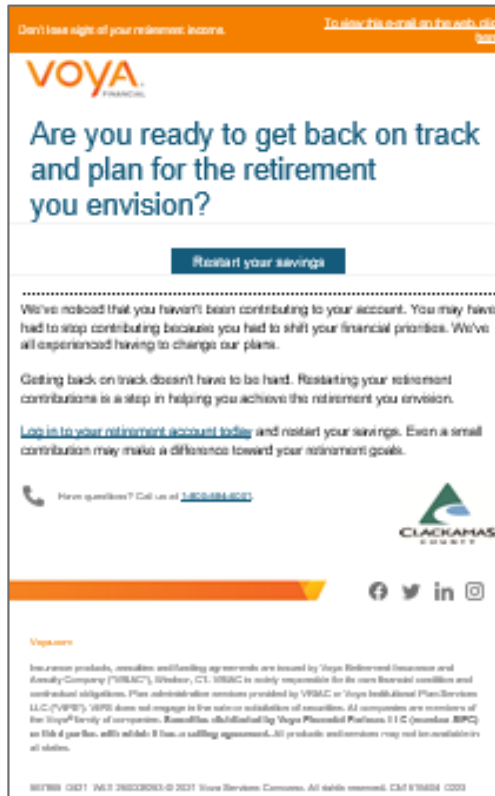
Average benchmarks (All industries) - open rate: 21.5%, click-through activity: 2.3%

Average benchmarks (Financial Services) - Unique open rate: 27.1%, click-through activity: 2.4%

Campaignmonitor.com: 2021 Global Email Benchmarks data (1/1/21-12/31/21):

<https://www.campaignmonitor.com/resources/guides/email-marketing-benchmarks/>

Clackamas County – Restart Contribution html



July 13, 2022

Sent	Delivered	Total opens*
73	67	53

*Total opens is cumulative.

Clackamas County – Restart Contribution html

Deployment metrics

Delivered	Unique opens		
	Total	Desktop	Mobile
67	31 (46.27%)	29 (93.55%)	2 (6.45%)

No hyperlinks clicked

Average benchmarks (All industries) - open rate: 21.5%, click-through activity: 2.3%

Average benchmarks (Financial Services) - Unique open rate: 27.1%, click-through activity: 2.4%

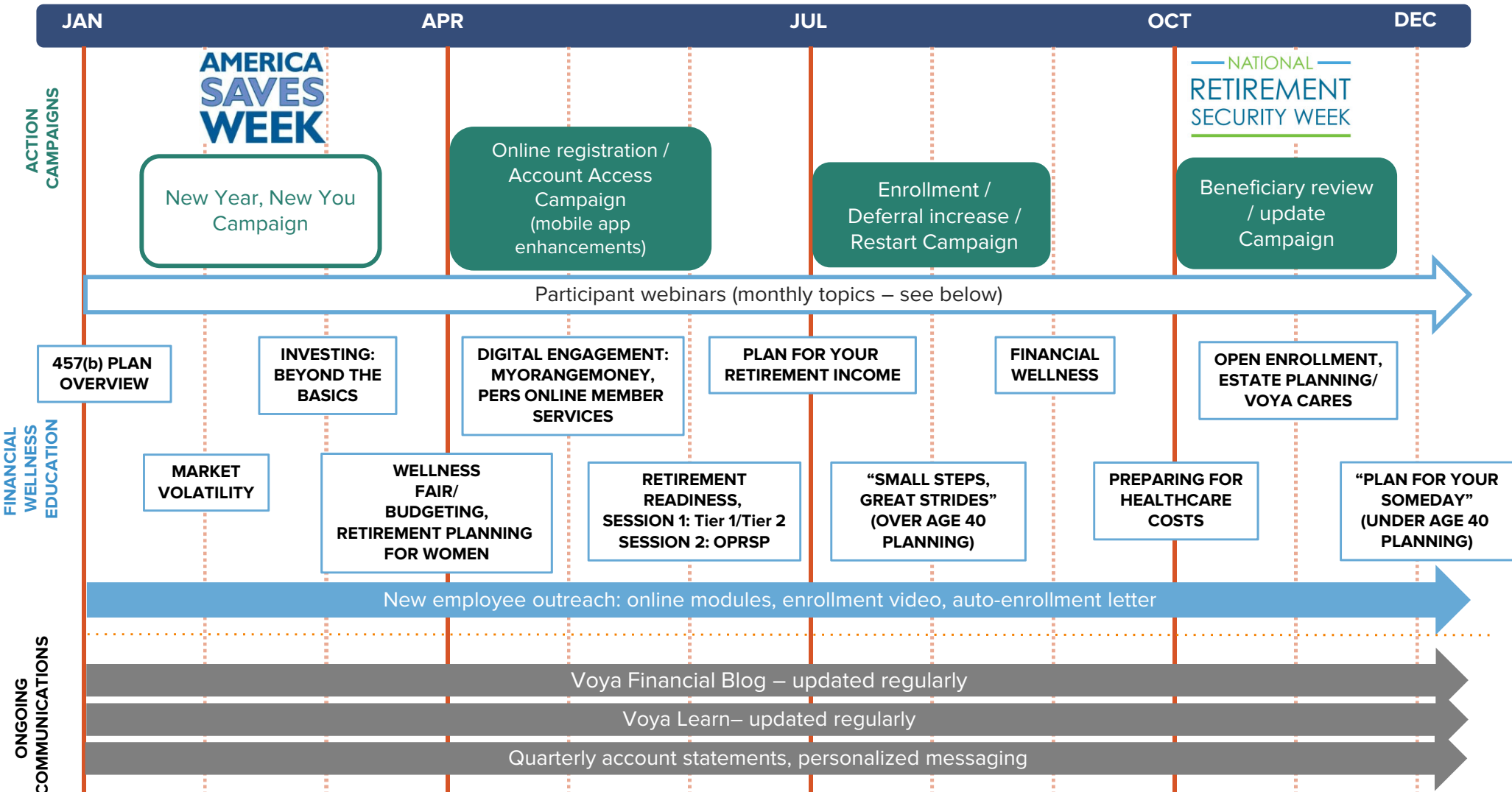
[Campaignmonitor.com: 2021 Global Email Benchmarks data \(1/1/21-12/31/21\):](https://www.campaignmonitor.com/resources/guides/email-marketing-benchmarks/)

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COLA email campaign scheduled deployment

- Enrollment html: 8/4/22
- Increase Deferral Amount html: week of 8/8/22
- Restart Contribution html: week of 8/8/22

Digital participant experience calendar



Financial Wellness

Participant webinars, hosted by Wendy Stefani, will be offered on a monthly basis.

Month	Webinar topic	Month	Webinar topic
January	457(b) Plan Overview	July	Plan for Your Retirement Income
February	Market Volatility	August	Small Steps, Great Strides: over age 40
March	Investing: Beyond the Basics	September	Financial Wellness
April	Wellness Fair / supporting webinars	October	Preparing for Healthcare Costs
May	Digital Engagement	November	Open Enrollment / Estate Planning
June	Retirement Readiness: Two sessions	December	Plan for your Someday: under age 40

- Wendy will host monthly Zoom educational webinars on a variety of financial topics. Her 30 year career with the County has created a long term relationship with your employees; she is recognized as their trusted financial advisor.
- Wendy will also offer monthly New Employee Orientation Zoom sessions. These meetings provide an opportunity to educate new employees on the 457(b) Plan features, automatic enrollment, automatic contribution rate increase (auto-escalate), default allocations, pre-tax vs. Roth after-tax contributions, Oregon PERS salary replacement ratios and the need to save for retirement.