

Beneficiary Personalized Letter Metric reporting



For plan sponsor use only. Not for use with participants.

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Personalized beneficiary letter: mailed 10/20/21

- 2,577 letters mailed to participants with a balance
 - 1,740 with no beneficiary on file
 - 837 with a beneficiary currently on file
- 198 participants added a beneficiary designation to their Plan account between 10/22/21 – 11/23/21
(previously did not have one assigned)



**Does not include beneficiary updates to previously existing designations*

Clackamas County – Extranet metrics

Visits to Clackamas.beready2retire.com

