

Beneficiary Personalized Letter Metric reporting



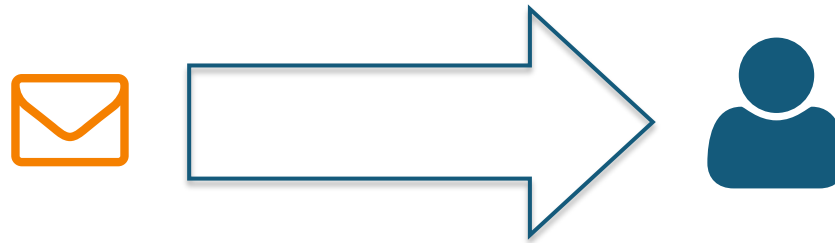
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Personalized beneficiary letter



“No beneficiary on file” letter mailed 11/15/22

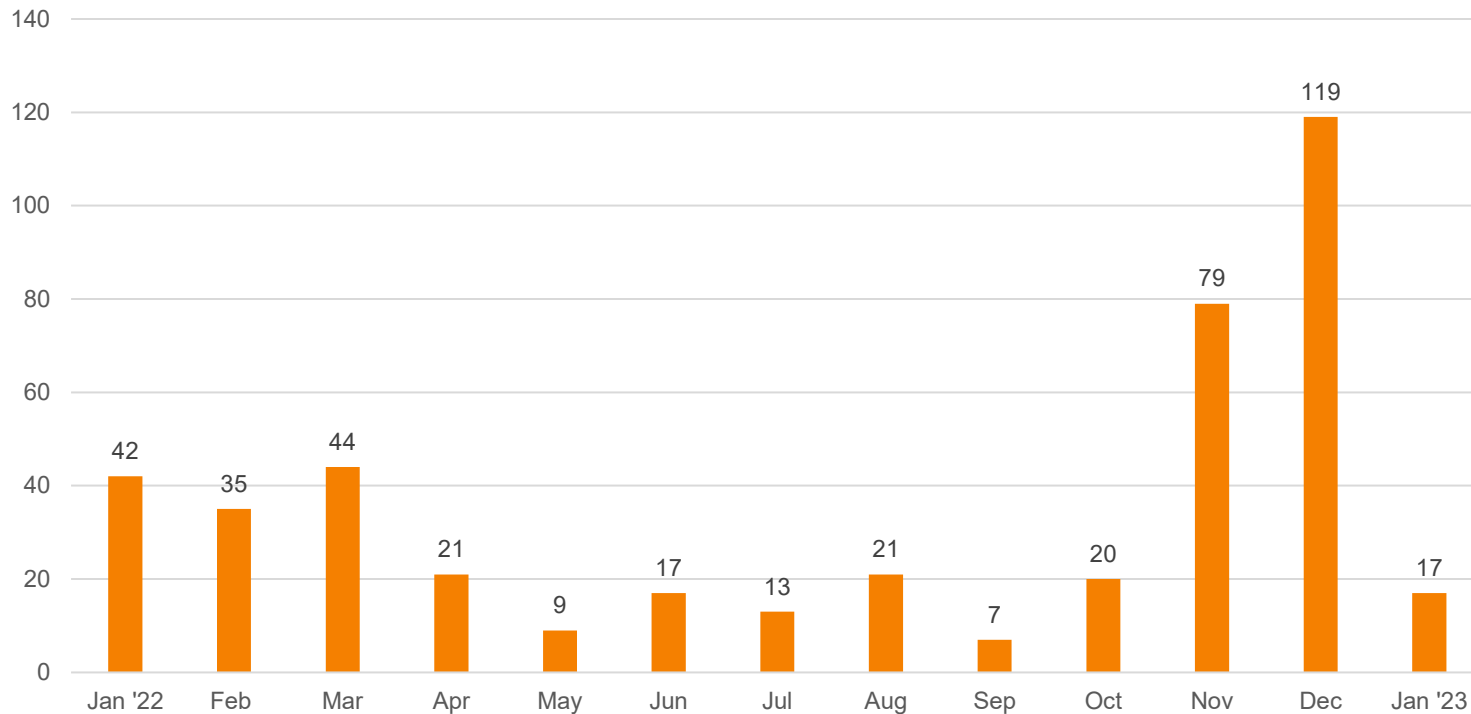
- 1,691 letters were sent to participants with no beneficiary on file
 - In 2021, we mailed 1,740 letters

“Beneficiary on file” letter mailed 11/22/22

- 1,476 letters were sent to participants with a beneficiary on file
 - In 2021, we mailed 837 letters

Beneficiary transaction changes

Number of beneficiary transaction changes per month



No beneficiary letter: mailed 11/15/22
Beneficiary on file letter: mailed 11/22/22

No beneficiary letter: mailed 11/15/22
Beneficiary on file letter: mailed 11/22/22

Effective 11/16/22 – 1/11/23: there were 203 beneficiary change transactions

- 165 / 203 transactions added a beneficiary (previously none on file)
- 37 / 203 transactions updated a beneficiary (previously had a beneficiary on file)
- 1 / 203 transaction was a new Plan enrollee who did not receive a letter



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

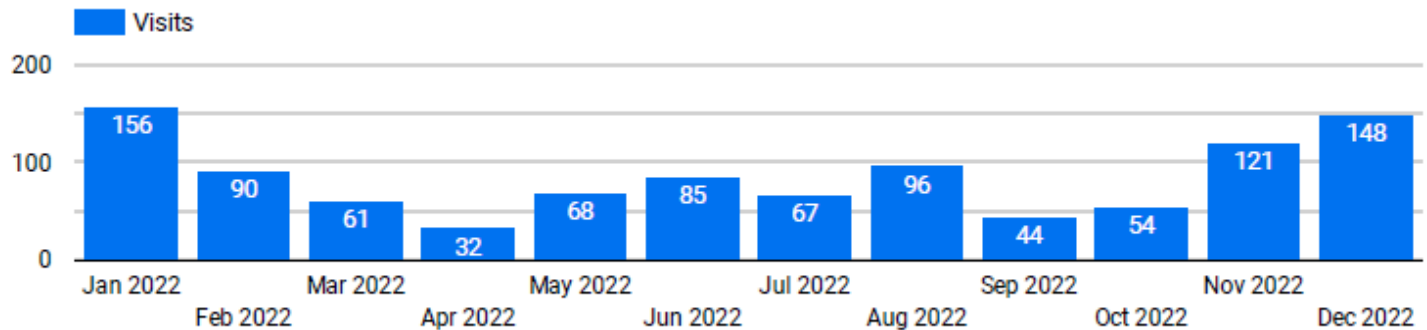
9.76% action rate to be used towards 2023 service guarantee: 10% increase in the first calendar year (2022), then 5% increase each of the following calendar years thereafter, or until 75% beneficiary is achieved.

Clackamas County – Extranet metrics

Visits to Clackamas.beready2retire.com

Visits by Month: 2022

Month	Visits
Jan 2022	156
Feb 2022	90
Mar 2022	61
Apr 2022	32
May 2022	68
Jun 2022	85
Jul 2022	67
Aug 2022	96
Sep 2022	44
Oct 2022	54
Nov 2022	121
Dec 2022	148



2023 New Year, New You Email Deployment Metric reporting



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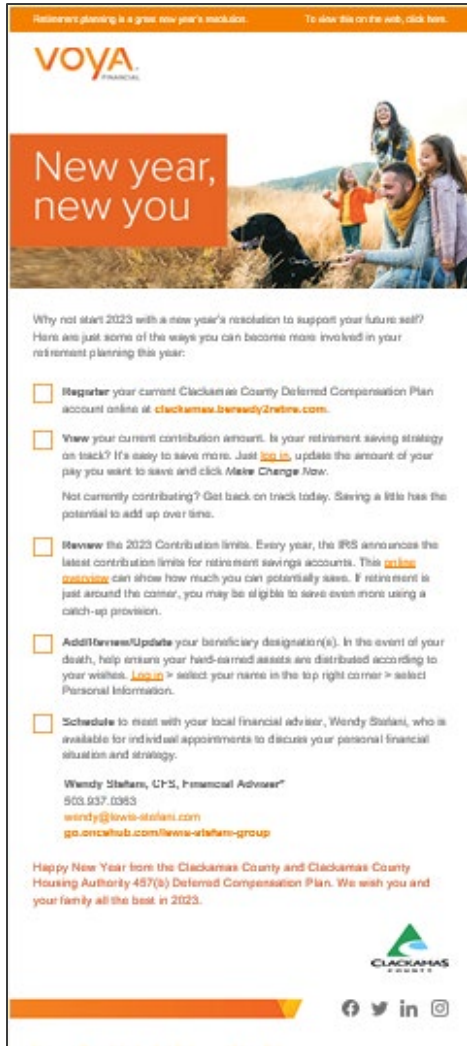
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“New Year, New You” email: deployed 1/26/23

Clackamas County – New Year, New You email



January 26, 2023

Sent	Delivered	Total opens*
2825	2822	1625

*Total opens is cumulative.

Clackamas County – New Year, New You email

Deployment metrics

Date	Delivered	Unique opens		
		Total	Desktop	Mobile
1/26/23	2822	806 (28.6%)	780 (96.8%)	26 (3.2%)

Hyperlinks clicked

Click Activity	1/26/23
Clackamas.beready2retire.com	34 / 806 (4.22%)
“log in” button	20 / 806 (2.48%)
IRS contribution limits microsite	7 / 806 (0.87%)
Online scheduler tool	6 / 806 (0.74%)

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/>