

Beneficiary Personalized Letter Metric reporting



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Personalized beneficiary letter

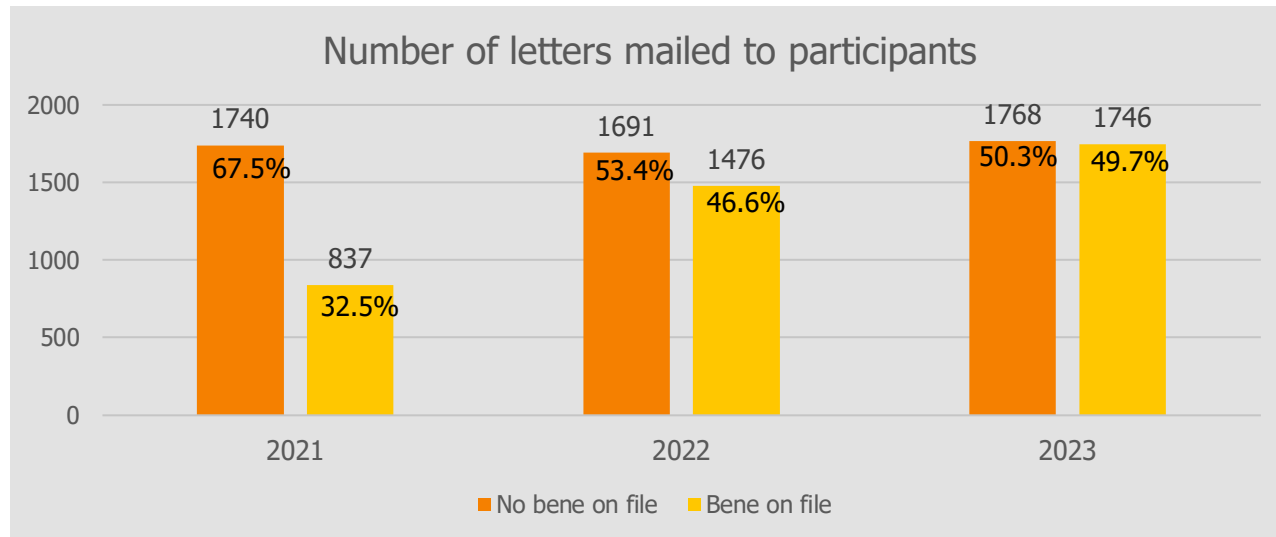


“No beneficiary on file” letter mailed 12/14/23

- 1,768 letters were sent to participants with no beneficiary on file

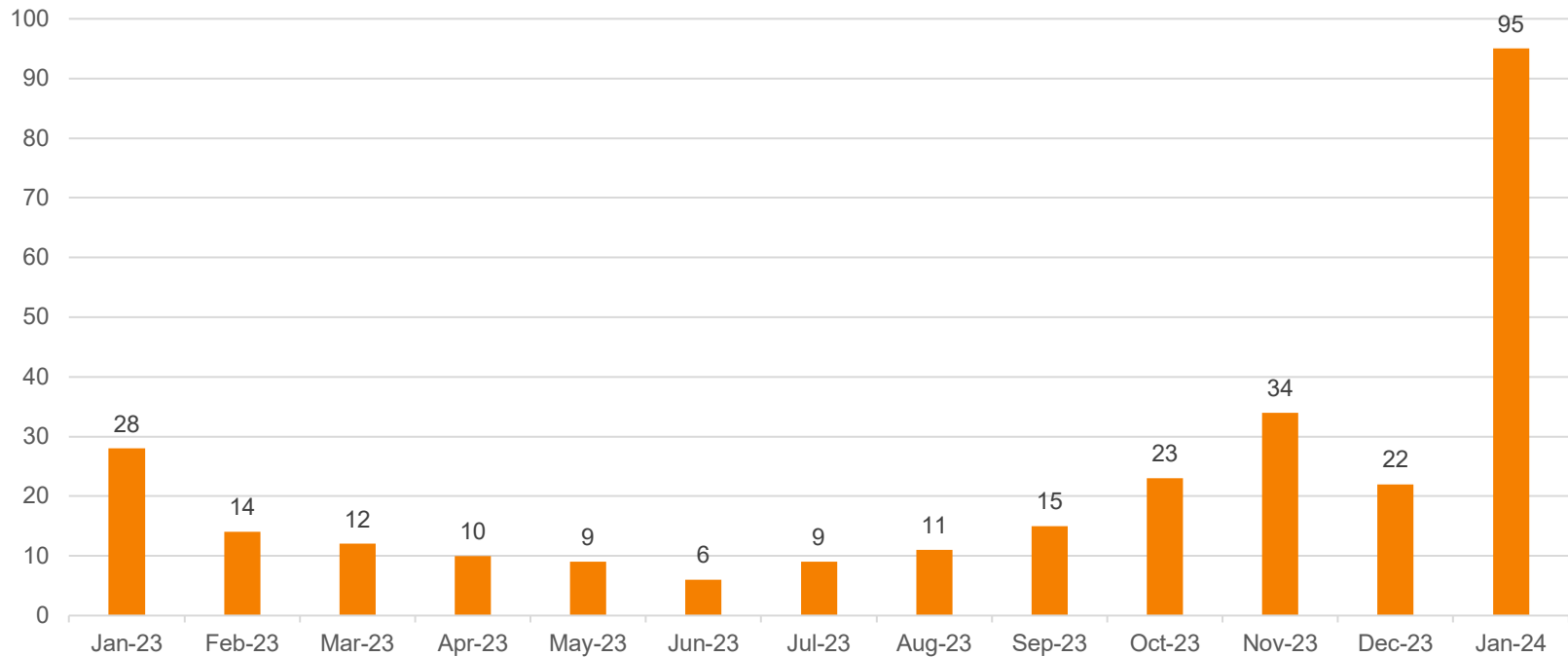
“Beneficiary on file” letter mailed 12/15/23

- 1,746 letters were sent to participants with a beneficiary on file



Beneficiary transaction changes

Number of beneficiary transaction changes per month



No beneficiary letter: mailed 12/14/23
Beneficiary on file letter: mailed 12/15/23

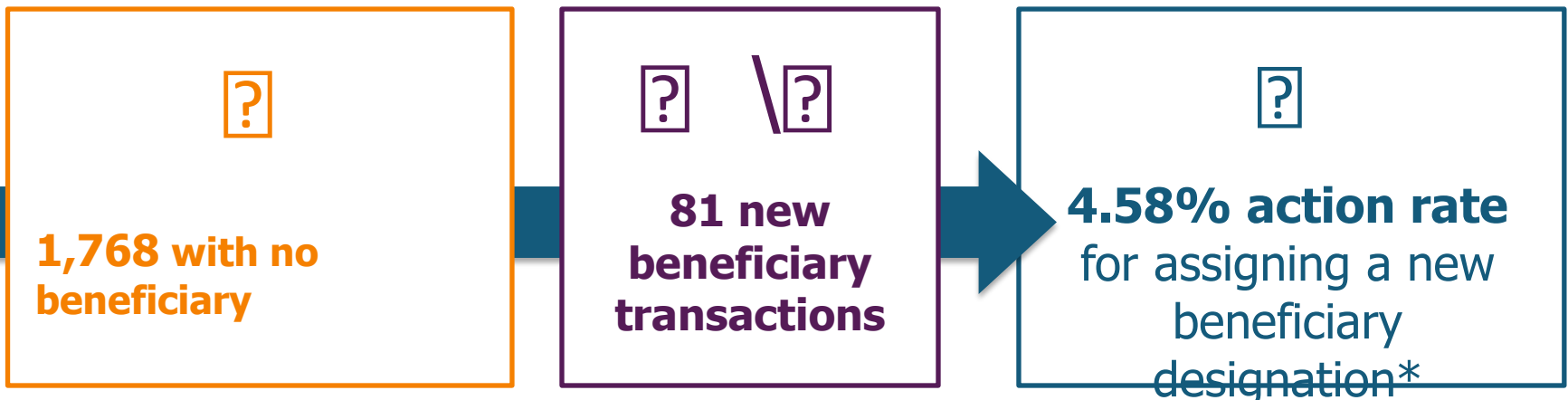


9 of 22 December transactions effective after mail dates

No beneficiary letter: mailed 12/14/23
Beneficiary on file letter: mailed 12/15/23

Effective 12/16/23 – 1/31/24: there were 104 beneficiary change transactions

- 81 / 104 transactions added a beneficiary (previously none on file)
- 18 / 104 transactions updated a beneficiary (previously had a beneficiary on file)
- 5 / 104 transaction was a participant who did not receive a letter

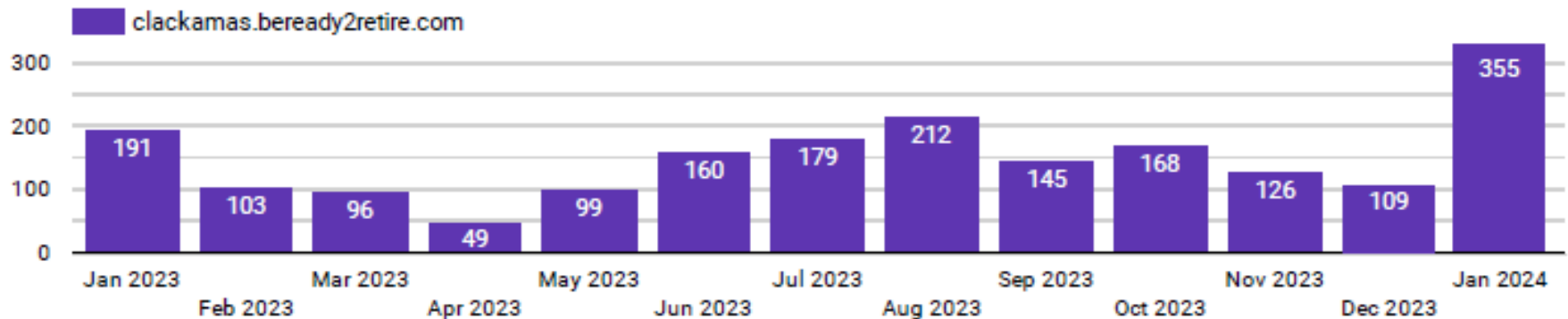


**Does not include beneficiary updates to previously existing designations*

4.58% action rate to be used towards 2024 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



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