

Beneficiary Personalized Letter Metric reporting (Q4 2024)



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Personalized beneficiary letter



“No beneficiary on file” letter mailed 12/15/24

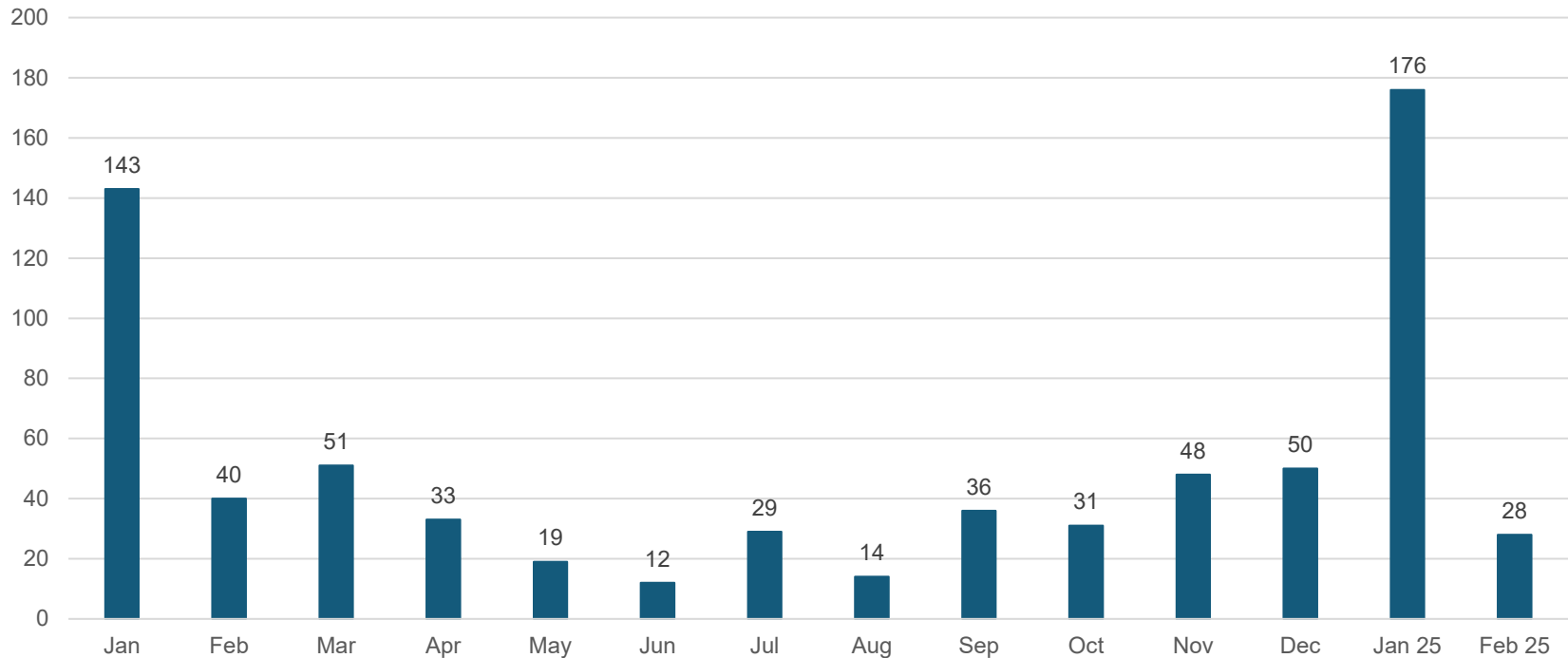
- 1,628 letters were sent to participants with no beneficiary on file

“Beneficiary on file” letter mailed 12/15/24

- 1,534 letters were sent to participants with a beneficiary on file

Beneficiary transaction changes

Number of ppt initiated beneficiary change transactions



No beneficiary letter &
Beneficiary on file letter: mailed 12/15/24



24 of 50 December transactions effective after mail dates

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

Effective 12/16/24 – 2/11/25: there were 228 beneficiary change transactions

- 134 / 228 added a beneficiary (previously none on file)
- 73 / 228 updated a beneficiary (previously had a beneficiary on file)
- 21 / 228 was a participant who did not receive a letter

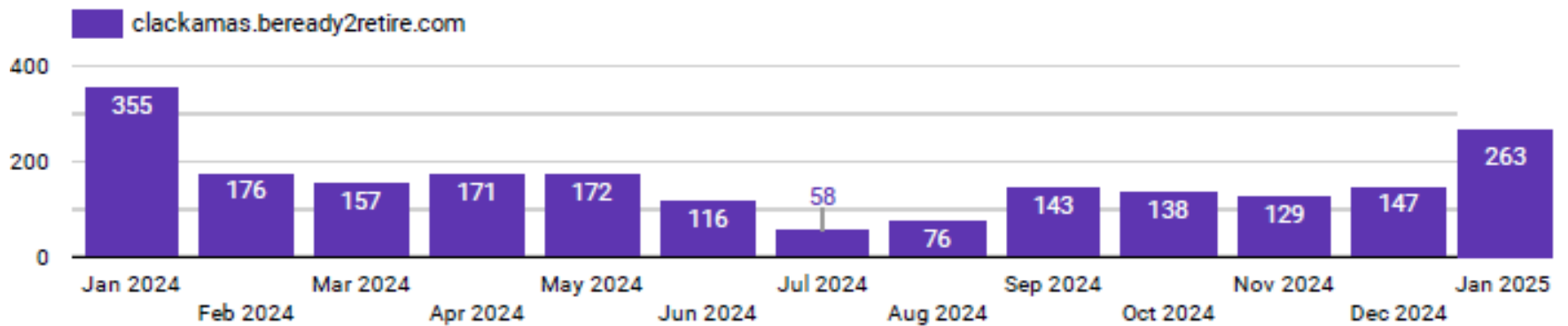


**Does not include beneficiary updates to previously existing designations*

8.23% action rate to be used towards 2025 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



No beneficiary letter &
Beneficiary on file letter: mailed 12/15/24