

Item 9



Fresno County

457 Deferred Compensation Plan

Quarterly Dashboard – March 31, 2018

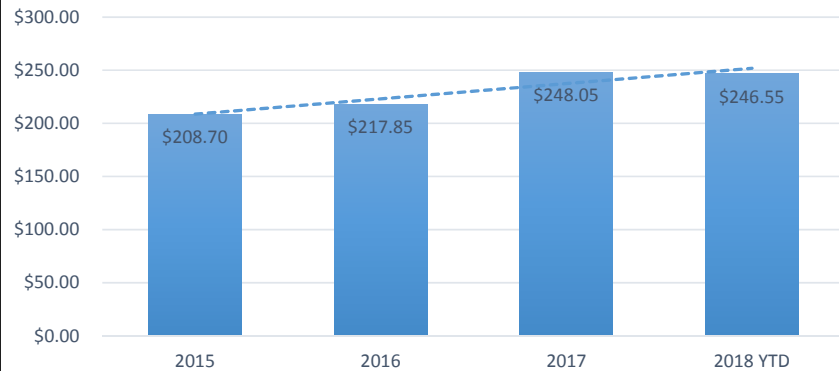


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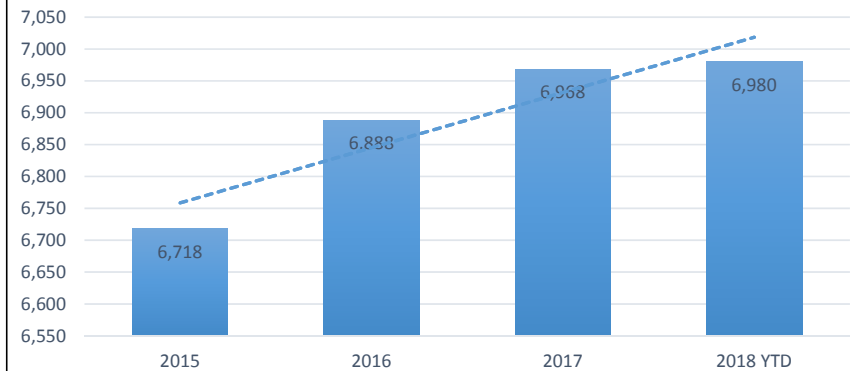
Section 1	Executive Summary
Section 2	Service Summary
Section 3	Plan Objectives Summary

Section 1 Executive Summary

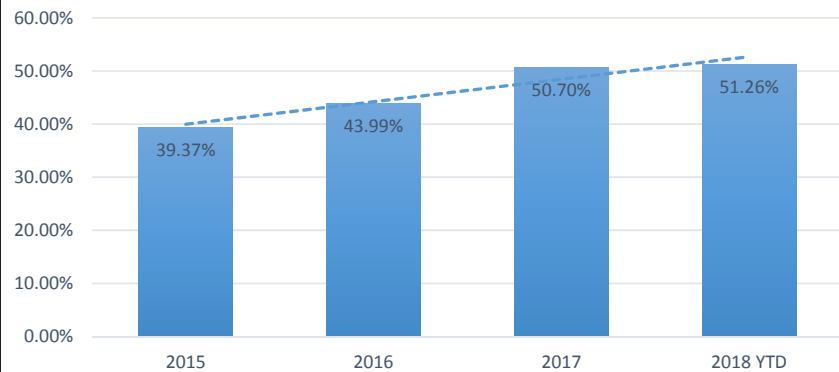
Plan Assets (millions)



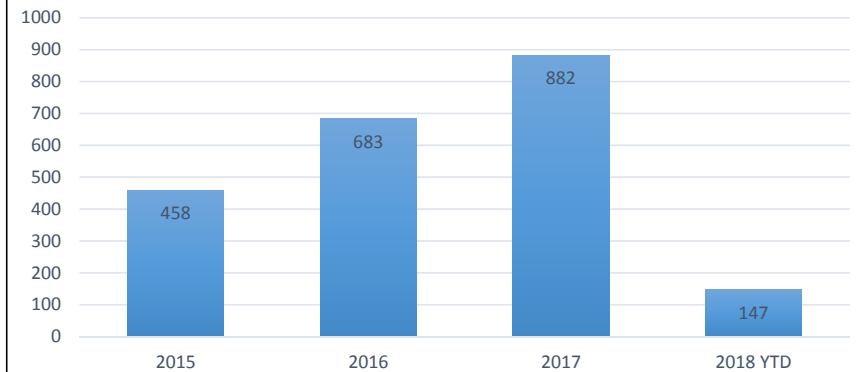
Eligible Employees



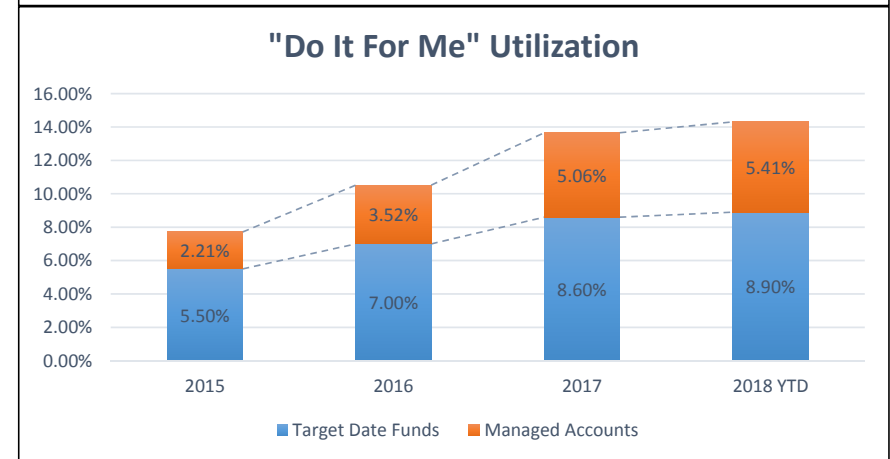
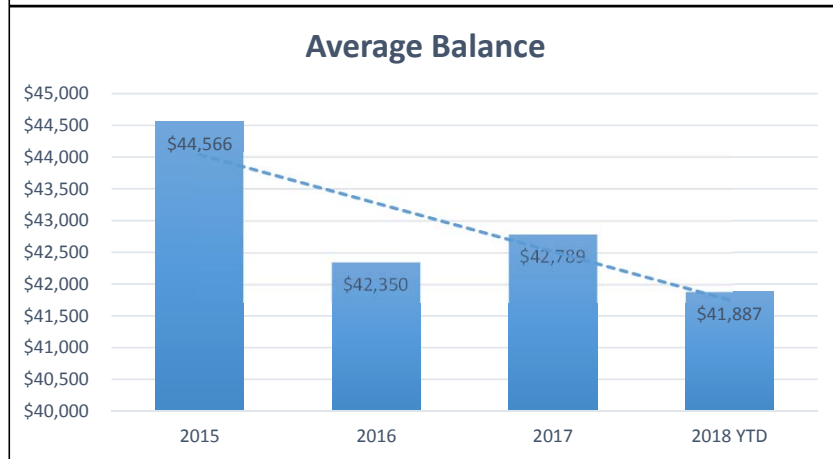
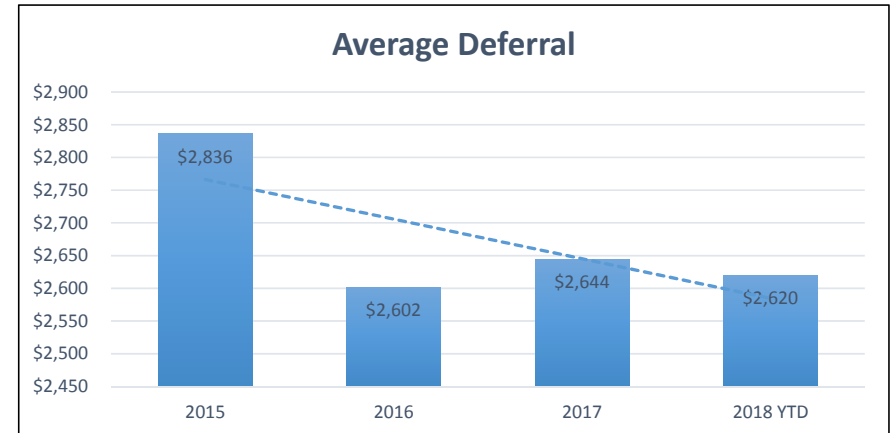
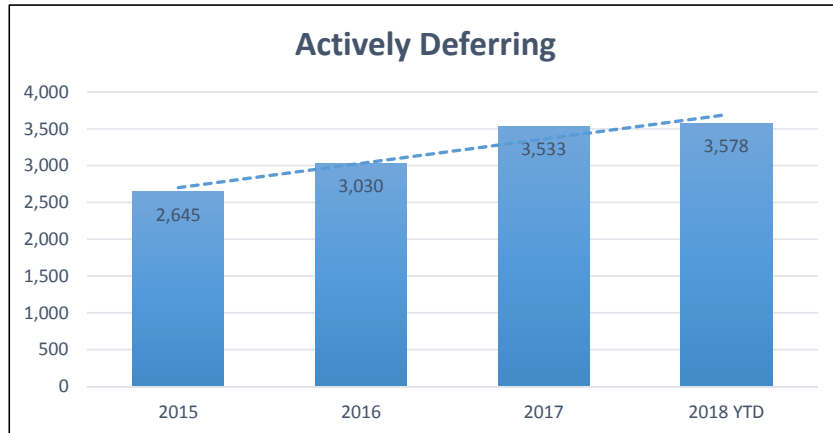
Participation Rate



Enrollments (YTD)



Section 1 Executive Summary



Section 2 Service Summary

FRESNO COUNTY SERVICE RECAP

NATIONWIDE RETIREMENT SOLUTIONS

3/31/2018

Quick Plan Facts

	As of 3/31/2018	% Change from 3/31/2017
Total Participant Count	5,886	+11.5%
New Enrollments YTD	147	-28.3%
Total Plan Assets (millions)	\$246.55	+8.6%
Total Deferrals YTD (millions)	\$2.65	+21.6%
ProAccount Assets (millions)	\$12.55	+63.7%
ProAccount Participant Count	380	+48.4%

2018 Education, Workshops and Counseling

Date	Event/Activity	Results
January/July	FCERA Nearing Retirement Workshop	Ongoing
January – December	Bi-weekly New Employee Training	Ongoing
March 19 – 25	Save Today Expo	See Below

Enrollments by Month:

Total 1st Quarter Enrollments: 147

Total March New Enrollments: 51

Total February New Enrollments: 47

Total January New Enrollments: 49

Save Today Results

Individual Interactions: 503

Enrollments: 63

Contribution Increases: 184

Beneficiary Updates: 96

Local Nationwide Service Team

Ed Malone – Program Director/614-327-2218/ malonee@nationwide.com

Phillip Edwards – Retirement Specialist/ 559-999-7971/edwarp4@nationwide.com



Section 3 Plan Objectives Summary



2018 Communication and Education Plan

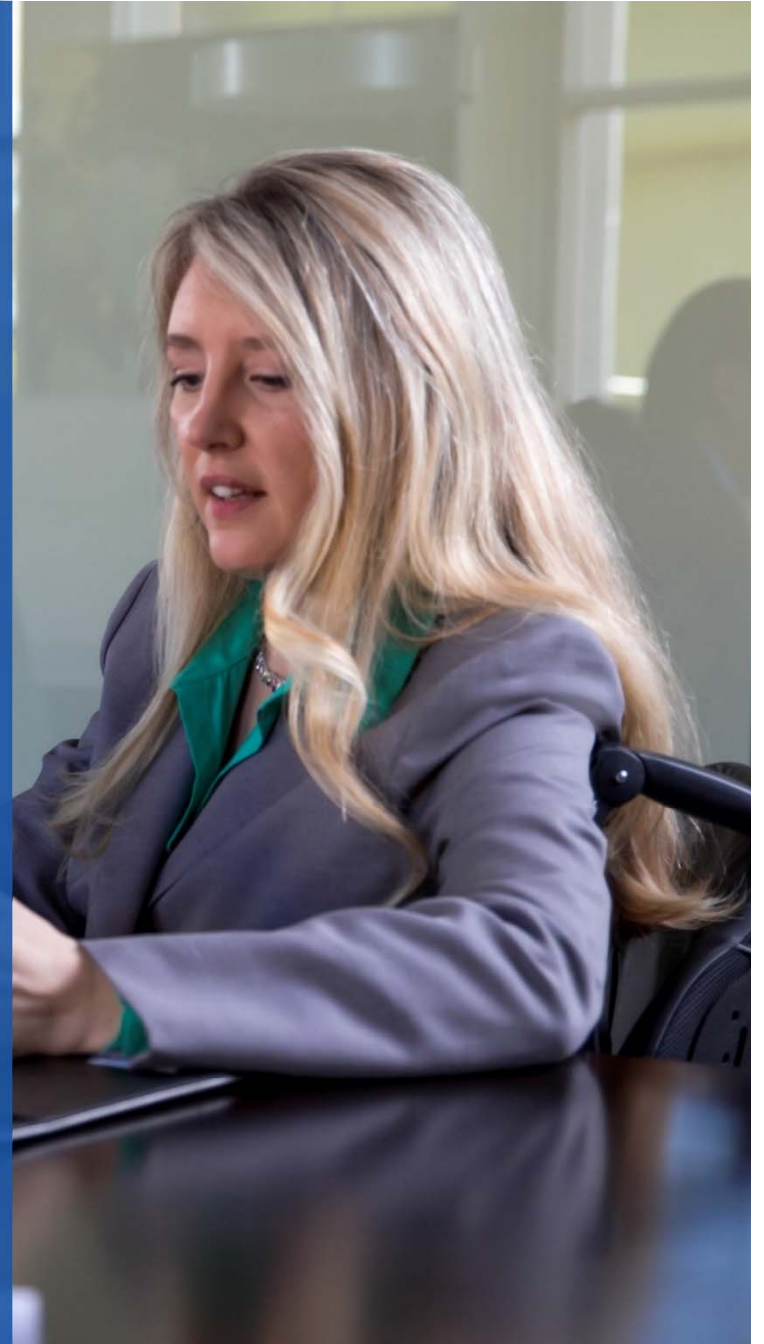
Prepared exclusively for:

Fresno County, CA

1/1/2018- 12/31/2018



Nationwide®
is on your side



Helping America prepare for and live in retirement



Nationwide is your expert partner

With
43
years

in the public sector retirement plans industry and more plans than any other provider, we are committed to helping your employees prepare for and live in retirement.

Many employees look to their employer for guidance and information on retirement savings. In fact, in a recent survey,



said that if their employer provided them with more education, they might contribute more to their plan.¹

You can have piece of mind knowing we are providing education to your employees throughout their lifetime.

We have developed a comprehensive **Communication and Education Plan** for you.

- Our goal is to motivate participants to act and improve their retirement readiness.
- It starts with a tailored approach to service your plan.
- It includes our Participant Engagement Program, targeting the right employees at the right time with the right messaging.
- Then, we support and reinforce those messages through local communications.

¹ 2010 Retirement Confidence Survey, Employee Benefit Research Institute and Matthew Greenwald & Associates

Representing your plan



Name: Ed Malone
Title: Program Director



Name: John Steggell
Title: Sr. Relationship Mgr.



Name: Phillip Edwards
Title: Retirement Specialist



Name: Kelli Kincaid
Title: Internal Retirement Spec.

Fresno County Performance Overview

Business Measure	2016	2017	2018	% Change
Plan Assets	\$218 M	\$248 M		
New Enrollments	683	882		
Actively Deferring	3,030	3,533		
Average Participant Assets	\$44,566	\$42,789		
Average Annual Deferral	\$2,602	\$2,644		
Average Asset Classes	3.6	3.8		

Your Plan Objectives

Through education, including creative strategies and tactics outlined in the following plan, we can help you achieve and recommend objectives that will benefit your employees, such as:



Your Plan Objectives

Promote plan participation and awareness

1

Raise awareness about your 457(b) plan and the reliable enrollment support that Nationwide provides.

- Provide print materials – EZ Enrollment Form
 - Fresno County Save Today Expo – March 19-26
 - Communicate directly with participants/individual consultations
 - New Employee Orientation/County Benefits Fairs
-

Encourage your participants to increase their contributions

2

Inform plan participants about taking advantage of the opportunities to increase their contributions and explore the long-term benefits of saving more now.

- Provide print materials – EZ Increase Form
 - Fresno County Save Today Expo – March 19-26/Nearing Retirement Seminar Jan-July
 - Communicate directly with key participant segments
 - Participants currently close to the max limit, age 50+ for Catch Up, or those who have not increased in the last year
-

Help participants simplify their retirement planning

3

Educate participants on the importance and benefits of proper asset allocation and encourage participating employees to consolidate their accounts.

- Print materials – Asset Allocation Mailer: Participants w/ 3 or fewer classes
 - Conduct group educational presentations, topic: Asset Allocation, Investor Profile
 - Fresno County Save Today Expo – March 19-26
 - Web based Retirement Readiness Report
-

Communication Grid

1 st Quarter Campaigns	Direct Mail	Email	Workshop	Web Banner or Statement
EZ Enrollment	X	X	Save Today	X
EZ Increase	X	X	Save Today	X

2 nd Quarter Campaigns	Direct Mail	Email	Workshop	Statement Messaging

Communication Grid

3 rd Quarter Campaigns	Direct Mail	Email	Workshop	Statement Messaging

4 th Quarter Campaigns	Direct Mail	Email	Workshop	Statement Messaging

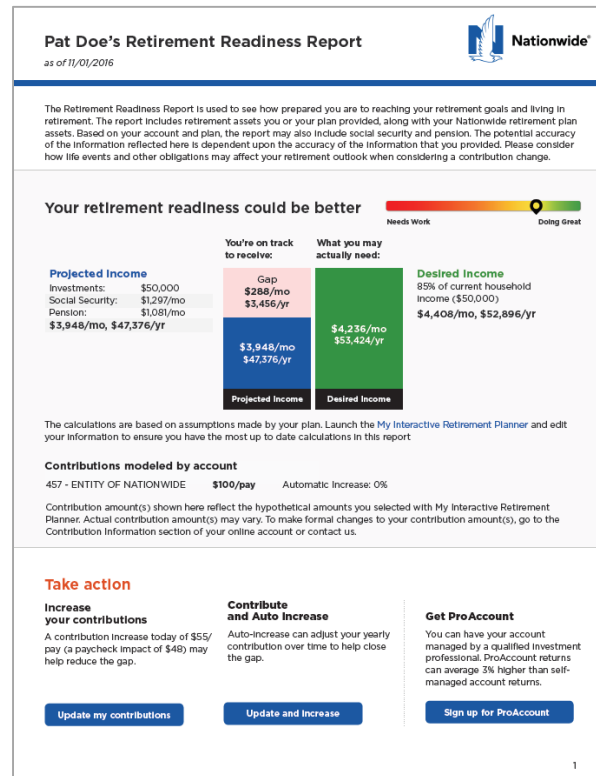
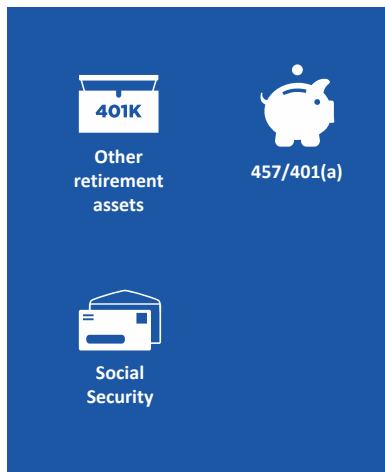
Ongoing communication materials



Plan Specific Campaigns

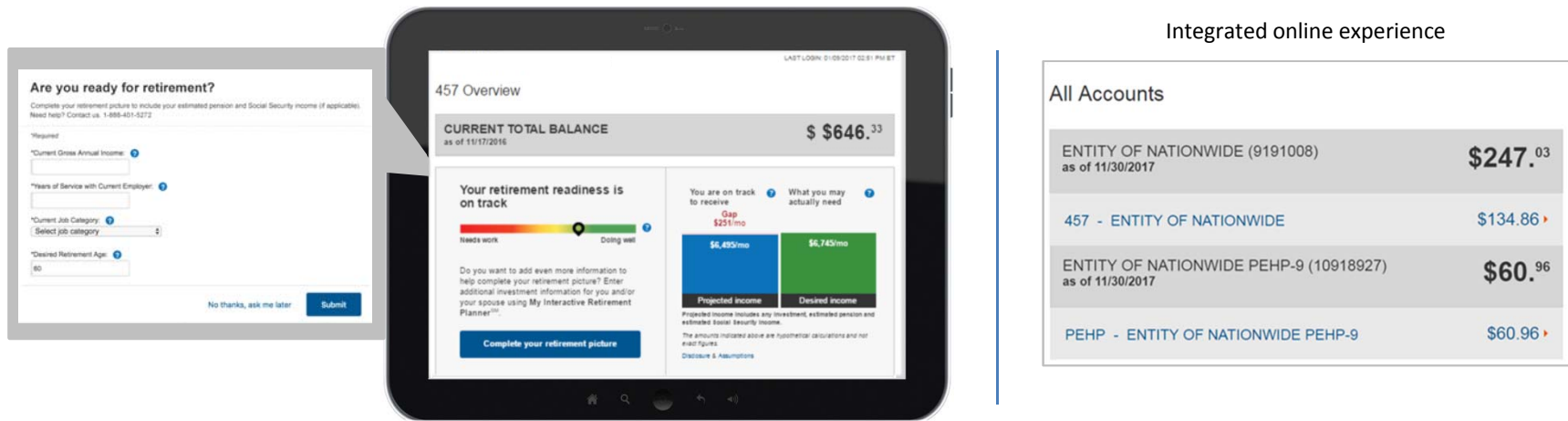
Such As: Increase Contributions / Asset Allocation / Consolidation

Our comprehensive online experience is available to participants

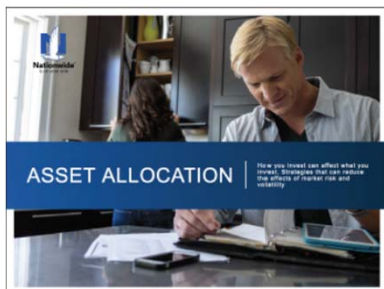


- Provided annually to all participants
- True comprehensive view
- Available online
- Generates awareness and provides next step

Our unique retirement readiness experience helps your participants prepare



Financial Education & Preparing for Retirement Workshops





Helping Fresno
County
employees
prepare for and
live in
retirement



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