



Wespath

BENEFITS | INVESTMENTS

CONFERENCE FORUM—MARCH 2018

Update on Engagement Efforts

Agenda

- Holistic View of Participant Engagement
- Participant Engagement Report
- Review of Specific Engagement Measures
- Questions

Strategic Goal—Participant Engagement












**Change participant behavior
to measurably improve retirement readiness
and lifelong well-being.**

New—Holistic View of Participant Engagement



Participant Engagement Report

Metric	December 31, 2017	
Percentage with projected retirement income gap	82% project a gap of 21% on average	
Percentage contributing to UMPIP	76%	
Average UMPIP contribution percentage	5%	
Percentage that contacted EY	11%	
Percentage registered for Benefits Access	42%	
Enrollment in CDHP/HDHP plans	52% (HealthFlex Exchange) 26% (Traditional)	
Blueprint for Wellness completion percentage	52%	
Health Quotient completion percentage	74%	
Virgin Pulse participation	46%	

Automatic Features

6 conferences (plus Wespath) adopted **automatic enrollment** for 2018

- **3 conferences** also adopted **automatic contribution escalation** for 2019
- **1 conference** elected to include only new hires in auto features

4.36%

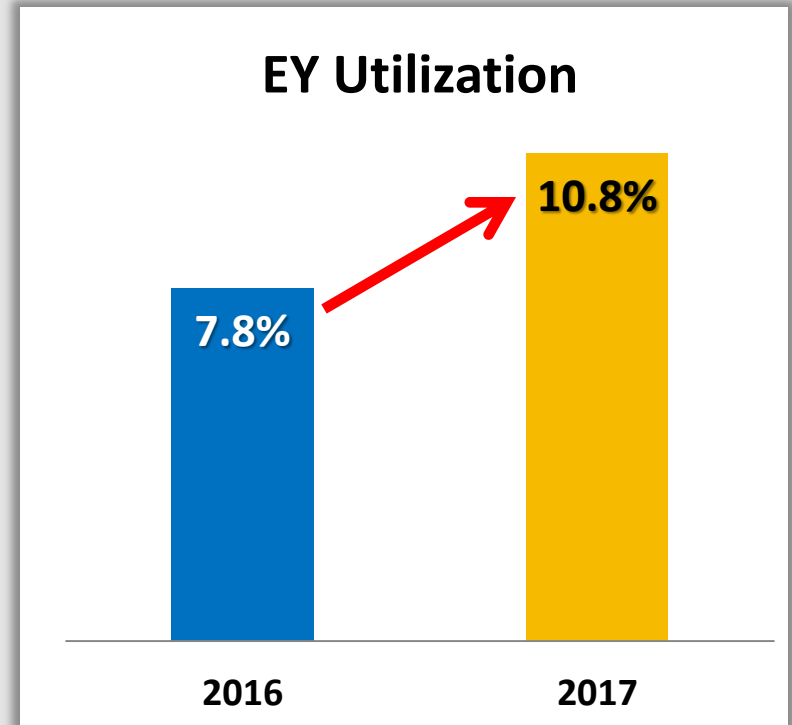
PRE-ROLLOUT

4.99%

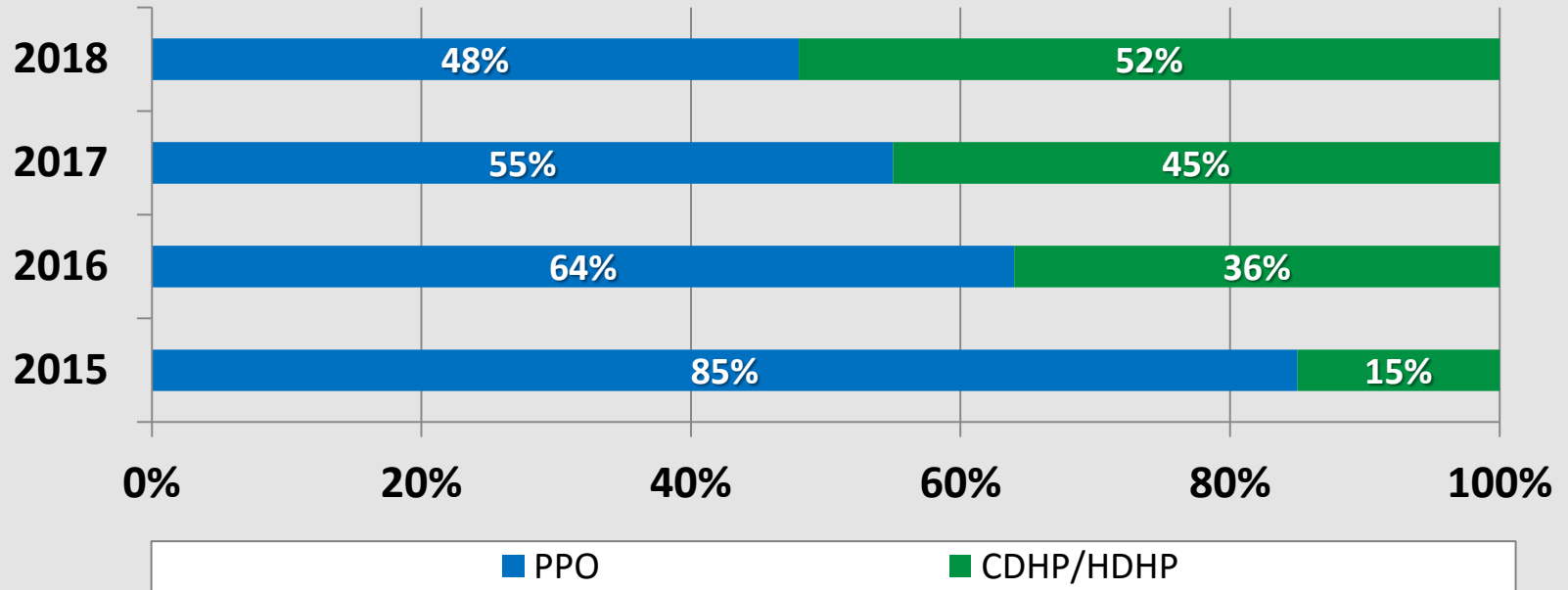
POST-ROLLOUT

Financial Planning

- In-person EY workshops at 19 conference events in 2017
- Sent promotion postcards
 - EY Financial Planning Services
 - LifeStage Retirement Income
 - Benefits Access projection tools



HealthFlex Exchange—Multi-Year Enrollment Analysis



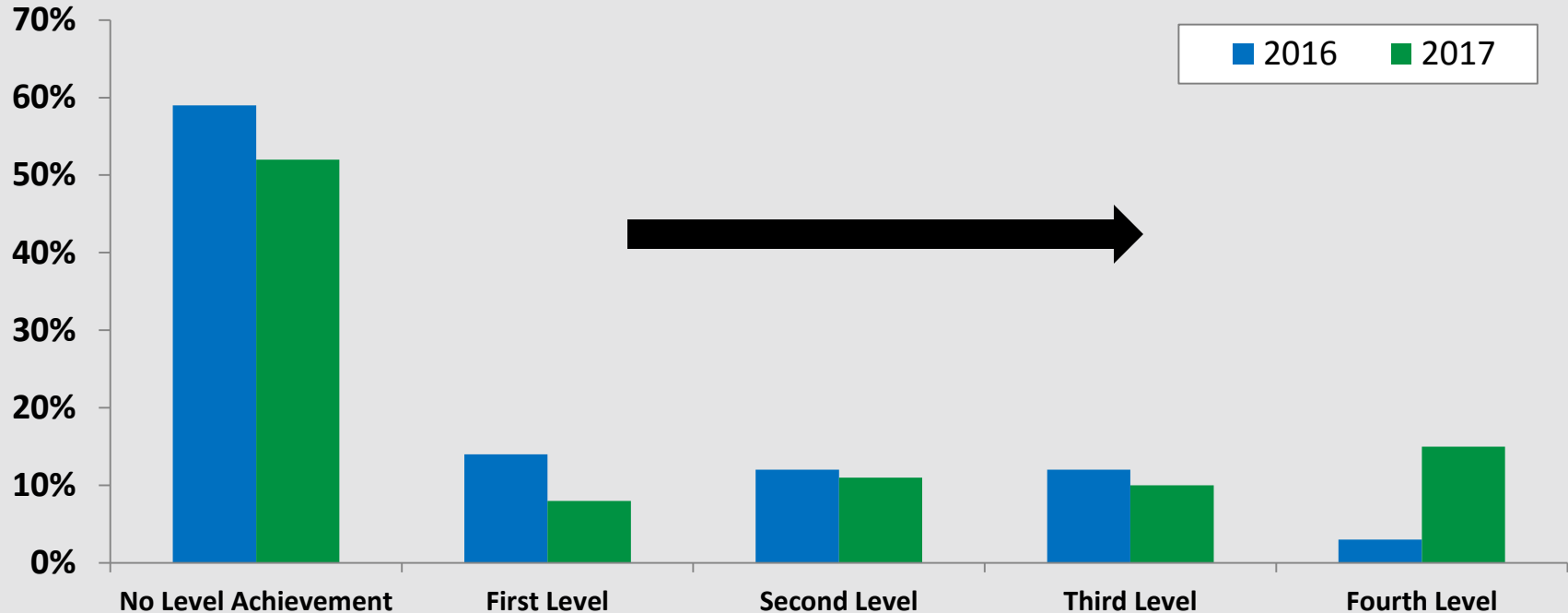
Analysis based on 17 plan sponsors in 2018; 14 in 2017; 8 in 2015 and 2016

Well-Being



Increase Engagement in Virgin Pulse

Members who participate continue to engage in the program for the full quarter



Looking Forward: Enhanced, Integrated User Experience





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