

Financial Well-being

International Financial Services Advisory Firm

THE OBJECTIVE

Improve retirement readiness and overall financial well-being.



Improving engagement and increasing retirement readiness.

THE LOCKTON SOLUTION

- Positioned financially healthy behavior by partnering with a wellness service to provide points against healthcare premiums for attending meetings.
- Launched associate Twitter campaign on health and financial wellness topics.
- Re-structured plan design to double automatic enrollment defaults and add automatic savings escalation to 10%.



THE RESULT

40% of employees attended one-on-ones:

- 29% adopted voluntary automatic increase.
- 50% increased deferrals.
- 87% elected beneficiaries.

Exceeded all stated goals.



The communication is offered solely for discussion purposes. Lockton does not provide legal or tax advice. The services referenced are not a comprehensive list of all necessary components for consideration. You are encouraged to seek qualified legal and tax counsel to assist in considering all the unique facts and circumstances. Additionally, this communication is not intended to constitute U.S. federal tax advice, and is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code or promoting, marketing, or recommending any transaction or matter addressed herein to another party.

This document contains the proprietary work product of Lockton Financial Advisors, LLC, and Lockton Investment Advisors, LLC, and is provided on a confidential basis. Any reproduction, disclosure, or distribution to any third party without first securing written permission is expressly prohibited.

Securities offered through Lockton Financial Advisors, LLC, a registered broker-dealer and member of FINRA, SIPC. Investment advisory services offered through Lockton Investment Advisors, LLC, an SEC registered investment advisor. For California, Lockton Financial Advisors, LLC, d.b.a. Lockton Insurance Services, LLC, license number 0G13569.

