

**Financial Education: Retirewise®**

# Help your employees take a holistic approach to achieve their financial goals



## We go beyond your 401(k) or 403(b) provider

We have designed a comprehensive financial and retirement education resource that can not only help support and complement your benefit offerings, but also provide your employees with the information they need to take action and make smarter decisions. All at no cost to you and your employees.



## Education is your employees' greatest tool

As a foundation to MetLife's PlanSmart® workshop series, Retirewise®, an award-winning program, can play an important and fundamental role in your employees' financial and retirement planning. The program delivers objective information that covers a broad spectrum of financial and related topics from basic investing concepts to the importance of having a will.

### The program is divided into four parts:

1. Building the Foundation
2. Creating and Managing Wealth
3. Establishing Your Retirement Income Stream
4. Making the Most of What You Have

MetLife has an arrangement with third party financial professionals to deliver the program. These specially trained local financial professionals deliver each session and are available for an optional one-on-one educational consultation. No matter what age, background or stage of planning your employees are in — there is something for everyone to learn.

## According to a survey<sup>1</sup> of Retirewise workshop series attendees:

- Nearly all attendees would recommend the workshop (99%).
- Nearly all attendees (90%) now plan on taking action on personal retirement planning.
- 99% rated their workshop speaker as professional, 99% rated their workshop leader as knowledgeable, and 98% considered the content objective.

**“I really like the group workshop format. It gave me a chance to hear other people’s concerns.”**

Ryan M. – Business Development Manager, little league coach

**Our high standards help ensure a successful program for you**

Retirewise can be easily customized to reflect your company’s benefits package, so your employees better understand the value of your current benefit offerings, such as your 401(k) or 403(b) plan, and the importance of their participation.

The workshops are delivered by experienced, licensed third party financial professionals who meet stringent credentialing requirements. Retirewise is available nationwide to ensure that all your employees benefit from the same resources, no matter where they are located.

**It’s easy**



Our team will work closely with you to best meet the needs of you and your company. We take care of all the logistics — from providing customized employee communications to convenient on-line registration for workshops and individual consultations.

We will supply employees with program materials at the workshops, including interactive exercises and a comprehensive workbook — theirs to keep for future reference. We’ll also provide you with the program results, including employee feedback, to help you gauge the program’s effectiveness.

Contact your MetLife representative or visit **MetLife.com/plansmartsolutions** for more information about this valuable program.

**Experience you can count on:<sup>2</sup>**

**2,035**  
companies offer Retirewise

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**14,478**  
Retirewise workshops delivered

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**261,277**  
Retirewise attendees

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**104,762**  
of attendees requesting appointments

**Go with an award winning program**



1. 2021 Retirewise Satisfaction Survey Results  
2. Retirewise Workshop Data Results

MetLife administers the PlanSmart program and has arranged to have specially-trained third party financial professionals offer financial education. financial professionals providing financial education are not affiliated with MetLife but are providing the program under a service provider contract.

