



How Healthy Is Your Retirement Plan?

Like many companies, you invest in your employees by offering them a retirement plan option. That's great, but is it enough? Do you know how your plan stacks up? Offering your plan's participants conflict-free professional investment advice could help them retire with confidence. Financial Engines can help.

Taking the first step

Whether getting a check-up or planning for the future, inertia is often the biggest hurdle. Do your employees know where to begin?

Exercising (your benefit)

A simple way for employees to boost their savings is to contribute up to the company match. Many are not. Are they aware of the potential impact?

Diagnostics

Getting the right advice can make a big difference in long-term outcomes. Are your employees making appropriate investments for their future?

Ongoing wellness

Making an informed Social Security decision can have a lasting impact, with higher benefits lasting for life. Are your employees prepared to confront this complex decision?



Get your customized retirement plan health check analysis

Let us show you the significant potential impact Financial Engines' advisory services could have on your plan and participants. Provide us with a few plan details, and we'll create a customized analysis specifically for your company.

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Sources

1. 2014 RCS Fact Sheet #6: Preparing for Retirement in America. Retirement Confidence Survey, Employee Benefit Research Institute and Greenwald & Associates.

2. Missing out: How much employer 401(k) matching contributions do employees leave on the table? Financial Engines, May 2015.

3. Investment Advice—Participants and Beneficiaries; Proposed Class Exemption for the Provision of Investment Advice to Participants and Beneficiaries of Self-Directed Individual Account Plans and IRAs; Proposed Rule; Notice, U.S. DOL.

4. Help in Defined Contribution Plans: 2006 through 2012. May 2014. Help is defined as managed accounts, online advice, and target date funds. See www.financialengines.com for more information.

5. 2014 RCS Fact Sheet #7: Attitudes About Current Social Security and Medicare Benefit Levels. 2014 Retirement Confidence Survey, Employee Benefit Research Institute and Greenwald & Associates.

6. Financial Engines Data Warehouse; data compiled between March 13, 2014 and January 12, 2015. Increased benefit amounts refer to expected benefit improvements over the lifetimes of household members, assuming users implement the claiming strategies proposed by Financial Engines' Social Security guidance.

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