



# Retirement Planning in 2022

What employees want;  
What municipalities need;  
What delivers results!



October 4, 2021

**MissionSquare**  
RETIREMENT

**Our mission:  
helping you  
& your  
employees**

**WHAT EMPLOYEES  
WANT**



**WHAT PLAN  
SPONSORS NEED**



**WHAT DELIVERS  
RESULTS**



# What employees want

- Convenience
- Edutainment & digital tools
- Planning assistance
  - Financial basics: savings/budgeting
  - Advice and guidance
  - Life event resources
  - Social Security decisions
- Flexibility
  - Pre-tax & post-tax options
  - Income options and strategies

# What plan sponsors need



- Responsiveness and adaptability
- Financial wellness support
  - Holistic financial awareness
  - Accessible tools
  - Customizable education
- Cybersecurity support
- Fiduciary support

# What delivers results



- Creative problem solving
  - Increasing (incentivizing) participation
  - Controlling retiree healthcare liabilities
  - Attracting and retaining key personnel
- Omni-channel service delivery
  - Public service is not all desk work
  - Simplifying the message
  - “Creating” convenience
  - Making it personalized & entertaining
- Partnership & commitment
  - Working together
  - Monitoring plan data
  - Customizing education





# Thank You!

*October is National Retirement Security Month!*



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