

Port of Seattle

Sail Towards Your Financial Future Campaign

2025 NAGDCA Leadership Award

Participant Education and Communication

Summary

Plan Profile

Background Information

The **Port of Seattle** provides full-time employees with access to a **457 Deferred Compensation Plan** and a **401(a) Money Purchase Pension Plan** through **MissionSquare Retirement**. As voluntary a program, the plans serve as a vital resource for employees seeking to build financial security for retirement. Currently, the plans have approximately 4.042 participants and \$4 million in plan assets.

On March 4, 2025, the **Port** launched a “**Sail Towards Your Financial Future**” initiative to educate plan participants about the benefits and resources available to them, concluding on March 25, 2024. The program aimed to highlight best practices and key plan features that support a successful retirement strategy. Participants were encouraged to **retain their funds within the plan, schedule appointments with Retirement Plans Specialists and CERTIFIED FINANCIAL PLANNER® Professionals, attend webinars, increase contributions, optimize plan assets and investments and utilize financial wellness tools to manage their assets effectively through retirement.**

To inspire engagement, the **Port** partnered with **MissionSquare Retirement** to introduce the **Port of Seattle “Sail Towards Your Financial Future” Travel Campaign**, an interactive initiative designed to motivate participants to take action. Participants were encouraged to **engage with online tools and resources, complete a fun and informative financial quiz, schedule one-on-one consultations with financial professionals, attend webinars, update their beneficiaries, and review and update their contact information**—all essential steps in maintaining overall financial plan health.

Goals

The **Port of Seattle “Sail Towards Your Financial Future” Travel Campaign** aimed to:

- Enhance participant awareness and understanding of available financial wellness resources.
- Foster increased engagement with financial planning professionals and retirement tools.
- Encourage participants to retain assets within the plan for long-term financial stability.
- Promote proactive financial behaviors such as scheduling consultations, attending webinars, and reviewing account details.
- Improve overall retirement plan health by increasing contributions and preventing rollouts.

In Their Own Words

“We want our participants to develop a strong understanding of the many financial resources available to them, including valuable tools and expert financial planning professionals. It’s important that they recognize the benefits of maintaining their retirement accounts within the plan. The travel campaign offers a unique opportunity to engage with these resources in a dynamic and enjoyable setting, reinforcing the importance of utilizing the financial planning and retirement services provided by MissionSquare.”

— **Sonia Rogers, Retirement Plans Specialist for Port of Seattle. MissionSquare Retirement**

Written Justification

Detail Project Description/ Timeline

Event Promotion & Engagement

To maximize participation in the **Port of Seattle 2025 Sail Towards Your Financial Future Travel Campaign**, the Port implemented a strategic outreach initiative designed to engage and motivate participants:

- **Campaign Flyer:** A vibrant four-color flyer was distributed to all participants, introducing the campaign and generating excitement about “Embarking on Their Voyage to Financial Security.”
- **Email Campaign:** A series of four weekly emails reinforced engagement by guiding participants through their financial wellness journey:
 - **Charting Their Financial Course** – Setting the foundation for informed financial planning.
 - **Learning the Ropes** – Exploring key financial wellness tools and resources.
 - **Testing the Waters** – Encouraging active participation through quizzes and consultations.
 - **Keeping a Tight Ship** – Solidifying financial strategies and maintaining long-term stability.
- **Dedicated Microsite:** A comprehensive online resource hub provided participants with valuable financial planning information, ensuring easy access to essential tools and expert guidance.

Significance

The **Port of Seattle 2025 Sail Towards Your Financial Future Travel Campaign** had a significant and measurable impact on the **Port’s 457 Deferred Compensation and 401(a) Money Market Purchase Pension Plans**. The initiative led to a **100% increase in both contribution amounts and enrollments in the 457 and 401(a) Plans***, while **rollout amounts decreased by 45%***. Additionally, **roll-ins to these plans rose by 30%***, signaling greater retention of retirement assets. Employee engagement surged, with **CERTIFIED FINANCIAL PLANNER® Professional consultations increasing by 38%*** and **Retirement Plans Specialists consultations rising by 24%***.

Through strategic marketing and communication efforts, **the Port successfully strengthened overall plan participation and financial wellness among employees**, reaffirming the power of proactive financial education, personalized support, and accessible retirement planning resources in guiding participants toward confident financial decision-making.

*Results compare the one month prior to the campaign launch and the month of launch

Examples



Embark on Your Voyage to Financial Security.



Chart Your Course

Navigate the seas of your financial future with the help of your Port of Seattle 457(b) Plan professionals. **Anchors aweigh!**



Learn the Ropes

Holst your sails and learn something new with financial tools and webinars at your fingertips. **Full speed ahead!**



Test the Waters

Take a short quiz to put your financial knowledge to the test. Earn bonus points with some nautical trivia! **Fair winds!**



Keep a Tight Ship

Make sure your account information is shipshape to receive important updates and protect your loved ones. **Smooth sailing!**



Get started here:
www.missionsq.org/portofseattle-sail

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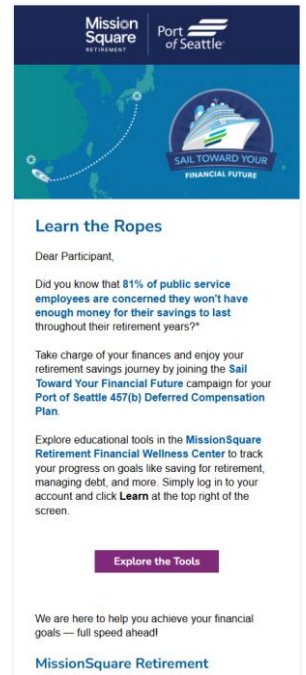
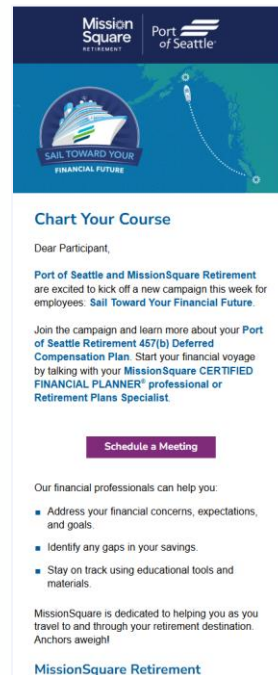
MissionSquare Retirement 777 N. Capitol Street, NE, Washington, DC 20002-4240

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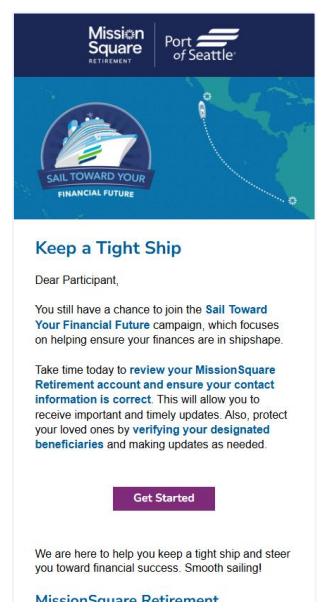
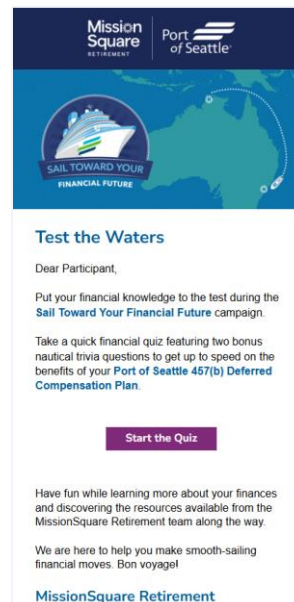
Flyer



Dedicated Microsite



Email Campaign



Results

The **2025 Sail Towards Your Financial Future Travel Campaign** led to significant improvements in participant engagement and retirement plan health. Key outcomes include:

- **100% increase in contribution increases** to the 457 and 401(a) Plans.*
- **100% increase in enrollments** into the 457 and 401(a) Plans.*
- **45% decrease in rollout amounts** from the 457 and 401(a) Plans.*
- **30 % increase in roll-ins** to the 457 and 401(a) Plans.*
- **38% increase in CERTIFIED FINANCIAL PLANNER Professional** consultations.*
- **24% increase in Retirement Plans Specialists** consultations.*

These results underscore the effectiveness of targeted financial wellness initiatives in driving participant engagement and strengthening retirement readiness.

Feasibility of Use by Other Governments of a Similar Size

The success of this campaign demonstrates that similar efforts can be easily replicated by government entities of comparable size. The participant focus can be tailored to different segments of the population, ensuring flexibility in addressing specific financial wellness needs.

*Results compare the one month prior to the campaign launch and the month of launch



100%

Increase in contribution increases to the 457 and 401(a) Plans*



100%

Increase in enrollments into the 457 and 401(a) Plans*



45%

Decrease in average participant rollout amount from the 457 and 401(a) Plans*



30%

Increase in roll-ins to the 457 and 401(a) Plans*