Monroe County

2025 Retiree Appreciation Dinner

2026 NAGDCA Leadership Awards

Participant Education and Communication

Summary

Plan Profile

Monroe County, New York, offers a **457(b) Deferred Compensation Plan through MissionSquare Retirement** to all full-time employees. The plan is purely voluntary and has approximately 4,770 participants and $456,000,000 in plan assets. Slightly more than 30% of plan assets are held by retirees or those separated from service, with about 40% of the plan participants age 50+ or older.

Background Information

In 2025, **Monroe County's Deferred Compensation Committee** set out to **more actively engage and support their 457(b) Deferred Compensation Plan high balance plan participants**, age 50 and older, including both County employees and participants no longer working for the County. The Committee sought to increase participant engagement through an in-person marketing effort and **hosting of a Retiree Appreciation Dinner and Reception.**

The **2025 Monroe County Retiree Appreciation Dinner** was created to elevate awareness of the on-site retirement education team that supports participants as they prepare for retirement, transition into retirement, and manage their ongoing financial needs. The County aimed to improve long-term plan outcomes by retaining participant assets within the 457(b) Plan, encouraging consolidation of outside accounts, increasing savings rates among employees nearing retirement, and providing guidance on sustainable withdrawal strategies and maximizing Social Security income.

To bring the initiative to life, the County partnered with MissionSquare, the third-party recordkeeper for the 457 Deferred Compensation Plan. The one-night reception included a cocktail hour, a formal dinner, and a question-and-answer session featuring a Retirement Plan Specialist and a Certified Financial Planner® from MissionSquare. Attendees had direct opportunities to receive personalized answers and discuss their individual retirement goals.

Goals

The 2025 Monroe County VIP Retirement Reception was designed to increase participant awareness of the retirement education team that helps them prepare and plan for a successful retirement and continues to support their needs throughout retirement.

The County sought to:

- Encourage consolidation of outside assets into the plan
- Boost savings rates for employees approaching retirement
- Assist retirees with asset depletion rates
- Maximize Social Security income
- Improve overall retirement plan health

In Their Own Words

"In hosting these retiree dinners over the past several years, our goal has remained the same: to help retirees understand the ongoing value of keeping their retirement accounts in the plan. These gatherings offer a great way for retirees to reconnect with former colleagues, while also giving us an opportunity to highlight the financial planning and retirement resources available through MissionSquare."

— Jennifer Cesario, Director of Finance/ CFO, Monroe County, NY
Monroe Deferred Compensation Committee

Detail Project Description/ Timeline

The campaign launched with a printed postcard invitation mailed to high-balance retired participants and those approaching retirement age, inviting them—and a guest—to attend the appreciation dinner. A coordinated email version of the invitation was also sent to participants with valid email addresses on file.

To ensure strong engagement and response rates, **Monroe County executed a weekly cadence of follow-up emails reminding participants about the event** and encouraging them to RSVP. Engagement was further strengthened by a final email and **a personalized phone call from the County's dedicated Retirement Plan Specialist,** who expressed her enthusiasm to meet participants in person and support their financial planning needs. **This personal outreach proved to be one of the most impactful elements of the campaign.**

Additionally**, a four-color PDF flyer was developed to support inbound questions and calls from participants**. The flyer included event details and a QR code that linked directly to the RSVP landing page, allowing participants to easily register from any device.

RSVPs, guest details, and meal selections were collected through a **streamlined online form**. Attendees were able to add the event directly to their digital calendars, received automated reminders before the dinner, and were sent a **personalized thank-you message and post-event survey immediately following the event**.

Significance

Attendance exceeded expectations, filling all reserved seating. Participants gained a stronger understanding of the Committee's commitment to supporting their long-term financial well-being and had opportunities to discuss personal retirement topics with MissionSquare specialists. **The event reinforced trust, increased visibility of the County's retirement education resources, and strengthened connections with this important participant group**.

The campaign **produced strong measurable results** with outcomes that demonstrate the effectiveness of personalized outreach in improving participant engagement and driving positive plan behaviors.

Result highlights include:

- 91.7% asset retention rate*
- 171% increase in CFP® **consultation enrollments*
- 324% increase in webinar enrollments
- 8.9% increase in roll-in assets*
- 2% decrease in participant roll-out amounts*

- Results compare the 3 months including and immediately following the September 18, 2025, event to the three months immediately preceding the event.
- CFP® professionals are registered representatives and investment adviser representatives of MissionSquare Wealth Management. MissionSquare Retirement is an SEC registered investment adviser and the parent company of MissionSquare Wealth Management. MissionSquare Wealth Management is a FINRA-registered broker-dealer, and SEC-registered investment adviser, and member of SIPC. MissionSquare Wealth Management is an affiliate of MissionSquare Investments and VantageTrust Company, LLC.

Post-event survey responses further highlighted the impact of the initiative:

High Usefulness of Content

94% of attendees found the information valuable, highlighting strong content relevance and impact.

Clear and Accessible Communication

79% agreed material was easy to understand, showing effective delivery of complex retirement topics.

Increased Knowledge and Confidence

66% reported improved understanding, indicating the session educated attendees on financial decision-making.

Feasibility of Use by Other Governments of a Similar Size

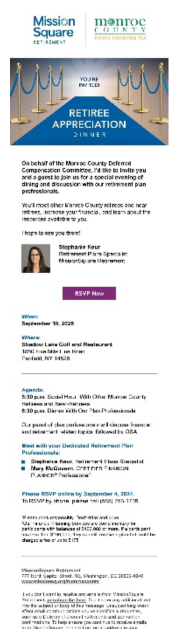
The project effort can be easily replicated by government entities of similar size, and the participant focus can be shifted to any segment of the participant population.

Examples

Flyer

Postcard

Agenda



Email

91%	**Retention Rate**
171%	**Increase in CFP® Consultation Enrollments***
324%	**Increase in Webinar Enrollments**
94%	**Found the information valuable, highlighting strong content relevance and impact.**
79%	**Agreed material was easy to understand, showing effective delivery of complex retirement topics.**

* Results compare the 3 months including and immediately following the September 18, 2025, event to the three months immediately preceding the event.

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