

CampaignManager's "Employee Group Definition" Screen

Assumptions

Select Content

Save Group

Done

Instructions:

1. Define below what type of employees should be in this group.
2. Click *Assumptions* above to enter the assumptions (investment return, etc.) to be used for this group.
3. Click on *Select Content* in the menu above to specify (and configure) a report, letter, or multipage piece to send to this group.
4. Click *Done* above when you are finished defining and specifying content for this group.

Employee Group: (Participants)

Enter the criteria for selecting employees to include in this group below.

Participation

- Include both participants and non-participants
- Include participants only
- Include non-participants only

Retirement income shortfall projection

- Include employees who are projected to have a shortfall as well as those who are on track
- Include only employees with projected shortfalls
- Include only employees who are on track

How long nest-egg is currently projected to last

- Do not limit the group based on how long the employee's nest-egg is projected to last
- Include only those whose nest-eggs are projected to last between years and years

Current contribution percentage

- Do not limit the group based on how much they are contributing
- Include only those contributing between % and %

Suggested contribution percentage

- Include all employees regardless of their suggested contribution
- Include only employees who have a suggested contribution of less than the maximum allowable
- Include only employees who have a suggested contribution of the maximum allowable
- Include only employees with a suggested contribution between % and %

Age range

- Do not limit the group based on age
- Include only those between the ages of and

Salary range

- Do not limit the group based on salary
- Include only those with salaries between and

Gender

- Do not limit the group based on gender
- Males only
- Females only

Location

- Do not limit the group based on location
- Include only this location:

(continued)

Job classification

- Do not limit the group based on job classification
- Include only this job classification:

Date-of-hire

- Do not limit the group based on date-of-hire
- Include only those with dates-of-hire between and (MM/DD/YYYY)

Custom data field 1

- Do not limit the group based on custom data field 1
- Include only employees with a value of in the data file field called "CustomField1"

Custom data field 2

- Do not limit the group based on custom data field 2
- Include only employees with a value of in the data file field called "CustomField2"

Number of (any type of) funds used

- Do not limit the group based on the number of funds used
- Include only those using between and funds

Number of pre-packaged funds (lifecycle, lifestyle, etc.) used

(These are funds which are intended to be used as the sole investment option.)

- Do not limit the group based on the number of pre-packaged funds used
- Include only those using between and pre-packaged funds

Allocation to pre-packaged funds (lifecycle, lifestyle, etc.)

(These are funds which are intended to be used as the sole investment option.)

- Do not limit the group based on the amount invested in pre-packaged portfolios
- Include only those with between % and % of their portfolios in pre-packaged portfolios

Allocation to other hybrid funds (balanced, asset allocation, etc.) funds

(These are funds which are not necessarily intended to be used as the sole investment option.)

- Do not limit the group based on the amount invested in hybrid funds
- Include only those with between % and % of their portfolios in hybrid funds

Allocation to stock funds

- Do not limit the group based on the amount invested in stock funds
- Include only those with between % and % of their portfolios in stock funds

Allocation to company stock

- Do not limit the group based on the amount invested in company stock
- Include only those with between % and % of their portfolios in company stock

Allocation to bond funds

- Do not limit the group based on the amount invested in fixed-income funds
- Include only those with between % and % of their portfolios in bond funds

Allocation to stable value funds

- Do not limit the group based on the amount invested in stable value funds
- Include only those with between % and % of their portfolios in stable value funds

Allocation to cash/money market funds

- Do not limit the group based on the amount invested in cash funds
- Include only those with between % and % of their portfolios in cash/money market funds

Content: (Gap Analysis (Barn))