



MetLife

According to a survey of employees attending the retirewise® workshop series:¹

- All attendees would recommend the workshop (100%).
- Nearly all attendees (99%) now plan on taking action on personal retirement planning.
- 100% rated their workshop leader as professional, 99% rated their workshop leader as knowledgeable, and 99% considered the content objective.



Help Your Employees Take a Holistic Approach to Achieve Their Financial Goals

WE GO BEYOND YOUR 401(K) OR 403(B) PROVIDER

We have designed a comprehensive financial and retirement education resource that can not only help support and complement your benefit offerings, but also provide your employees with the information they need to take action and make smarter decisions. All at no cost to you and your employees.

EDUCATION IS YOUR EMPLOYEES' GREATEST TOOL

As a foundation to MetLife's PlanSmart® workshop series, retirewise® can play an important and fundamental role in your employees' financial and retirement planning. The program delivers objective information that covers a broad spectrum of financial and related topics from basic investing concepts to the importance of having a will.

The program is divided into four parts, which include:

- Building the Foundation
- Creating and Managing Wealth
- Establishing Your Retirement Income Stream
- Making the Most of What You Have

Each session is delivered in person, by a local, specially trained financial professional, followed by an offer for an optional one-on-one personal consultation. No matter what age, background or stage of planning your employees are in — there is something for everyone to learn.

[continued >](#)

¹ 2014 Retirewise Satisfaction Survey Results

Experience you can count on²

- 1,200 companies offer Retirewise
- Over 7,200 Retirewise workshops delivered
- Over 136,000 Retirewise attendees
- 44% of attendees requesting appointments
- 540 Retirewise Financial Professionals, all specially trained and highly qualified

"I considered myself a somewhat knowledgeable investor before, but retirewise® showed me options I have never even thought about."

"The material was so easy to understand and touched on everything from budgeting to investing. Now I have the confidence to move forward and make some important and necessary changes."

EXPAND YOUR OFFERINGS WITH CONTINUING EDUCATION

For your employees who have attended the retirewise® workshop series, we offer the retirewise® Graduate workshop. As a refresher, the workshop provides an overview of the key takeaways from each of the retirewise sessions, so your employees can continue to learn about ways to take control of their finances and plans for the future.

OUR HIGH STANDARDS HELP ENSURE A SUCCESSFUL PROGRAM FOR YOU

retirewise® can be easily customized to reflect your company's benefits package, so your employees better understand the value of your current benefit offerings, such as your 401(k) or 403(b) plan, and the importance of their participation. The workshops are delivered by experienced licensed professionals who meet stringent credentialing requirements. retirewise® is available nationwide to ensure that all your employees benefit from the same resources, no matter where they are located.

IT'S EASY

Our team will work closely with you to best meet the needs of you and your company. We take care of all the logistics — from providing customized employee communications to convenient online registration for workshops and individual consultations.

We will supply employees with program materials at the workshops, including interactive exercises and a comprehensive workbook — theirs to keep for future reference. We'll also provide you with the program results, including employee feedback, to help you gauge the program's effectiveness.



Contact your MetLife representative or visit www.metlifeplansmart.com/solutions for more information.



Retirewise® received the first place 2016 Eddy Award from Pensions & Investments for ongoing investment education.

Retirewise® won the 2015 Hermes Creative Award from the Association of Marketing and Communication Professionals for its Integrated Marketing Campaign.

Retirewise® won the 2015 STAR Award for Excellence in Retirement Events and Conferences for its marketing, communication and digital efforts.

² Retirewise Workshop Results

Metropolitan Life Insurance Company (MLIC), New York, NY 10166. Securities products offered by MetLife Securities, Inc. (MSI) (member FINRA/SIPC), 1095 Avenue of the Americas, New York, NY 10036. MLIC and MSI are MetLife companies.

MetLife

Metropolitan Life Insurance Company
200 Park Avenue
New York, NY 10166
www.metlife.com