



EMPLOYEE ENROLLMENT SOLUTION

When new employees bring their retirement accounts from past employers, the Employee Enrollment Solution helps make it easy for them—and for you—to integrate their accounts into your plan.

Life transition events, like changing employment, can leave loose ends. The retirement plan account shouldn't be one of them, yet for employees, moving the account from the old to the new employer may seem confusing and intimidating.

- **One-fourth¹ to one-third²** of 401(k) balances are left behind when employees leave their company
- Employees may lose track of their funds, derailing retirement savings
- Enrolling in the new employer's plan is a process with which employees may want guidance; but time constraints limit the amount of help available to walk employees through the process

The Employee Enrollment Solution can help.

It simplifies the process, for them and for you. With access to a registered financial advisor, employees receive assistance with:

- Enrolling in the new employer's plan
- Making important decisions to help ensure their allocation is consistent with their overall retirement investment strategy
- Consolidating retirement assets in one place, making them easy to monitor and adjust

With the Employee Enrollment Solution, you potentially improve the chances that your employees will reach their financial goals. They receive the education, guidance and transaction support they need, using in-person or online help from a registered financial advisor.



Your StoneStreet advisor will deliver a customized program, tailored to your unique organization and employees. It will add value to your benefits program, without adding costs to the plan. Because employees are better informed about their retirement plan options, they may be more likely to roll their old plan balance into your plan.

What could that potentially mean to you?

- Increased plan enrollment
- Higher average deferral rates
- An increase in plan assets

Sign up today for the Employee Enrollment Solution, part of the Worksite Financial Solutions. Contact your StoneStreet advisor for information about how easy it is to start.

¹ *Spectrem Identifies Rollover Opportunities*, December 2011

² *Charles Schwab Finds More Workers Conducting 401(k) Rollovers into IRAs*, March 2010

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