

## Financial Wellness

# UPGRADE CHECKLIST

A new account experience upgrade will help put workers on the road to achieving financial wellness—but only if they understand the value of the new capabilities you're providing to them. Let this checklist help you guide them to a brighter tomorrow.

Here are the steps you can take to make the upgrade a success.

### Prepare your organization

- Enable your email systems to accept email from the Prudential domain: **em.email-prudential.com**

### Build excitement with workers

- Promote the launch on your intranet with the new account experience video and upgrade tutorial.
- Encourage workers to web-register.
- Remind workers to check their quarterly statement and [prudential.com/online/retirement](http://prudential.com/online/retirement) login page for more information.

### What you and your workers need to know about eligibility

- Workers enrolled in your plan and web-registered will be prompted to upgrade at log in.
- First-time web-registrants will automatically have access to the new account experience once the upgrade is live.

### What you and your workers need to know about upgrading

- Participants will receive a pre-upgrade email at least one week prior to the upgrade.
- To upgrade, workers need to know their current user ID, password and security question.
- Workers will need to set up a new profile to access the upgraded experience.

### Amplify the upgrade

Deploy workplace campaigns to keep employees engaged in financial wellness.

Each campaign consists of an email, poster, flyer, card and online banners.

- New Account Experience campaign.
- Financial Wellness Assessment* tool campaign.
- Plan A Budget* budgeting tool campaign.

Contact your Prudential representative for more information about these campaigns.

**Questions? Contact your Prudential representative.**