Retirewise® Workshop — Employee Satisfaction Results

Taking action

91% of employees plan to take action after attending the workshop series

What actions are employees planning to take as a result of attending the workshop?

- Increase my 401(k) or 403(b) contribution
  - Already done: 52%
  - Immediately to one year or more: 44%
  - Never: 4%

- Rebalance my 401(k), 403(b), or other investments
  - Already done: 27%
  - Immediately to one year or more: 70%
  - Never: 3%

- Create a budget
  - Already done: 47%
  - Immediately to one year or more: 51%
  - Never: 2%

- Review my employee benefits
  - Already done: 33%
  - Immediately to one year or more: 66%
  - Never: 1%

- Create a will, trust, or other estate planning documents
  - Already done: 27%
  - Immediately to one year or more: 71%
  - Never: 2%

Effectiveness of workshop series and speaker

Would recommend the series
- Yes: 99%
- No: 1%

Rated their speaker as professional
- 100%

Rated their speaker as knowledgeable
- 100%

Rated content delivered by speaker as objective
- Excellent/very good: 98%
- Good: 2%

Attendees plan to retire within
- 0 – 5 Years: 37%
- 6 – 10 years: 24%
- 11 – 19 years: 17%
- 20+ Years: 22%

Results based on feedback provided by 9,945 of the attendees across 947 workshops conducted between January 1, 2019 and December 31, 2019.
What employees are saying about Retirewise®

“I always felt intimidated to even look at the total picture, this made me more confident, made me a better consumer. It really changed my life.”
JJ. — Programmer, novelist

“At first I thought retirement is so far off — why even go? But honestly, these workshops provide so much valuable information — way beyond retirement. This is time well spent — regardless of age or financial experience!”
Erin G. — Dietitian, marathon runner

“I really liked the group workshop format. It gave me a chance to hear other people’s concerns and get all my questions answered. In this online world, it was actually nice to meet someone in person!”
Gerry B. — Professor, grandfather of two

“When it comes to finances, there is just so much to know — where to begin was my biggest question. After attending these workshops, I now know how to get started and what I need to do. I really feel like I have more control.”
Rene J. — PR Manager, foster mother

Sample of client companies providing feedback

Finance
Franklin Templeton

Manufacturing
Callaway
Crayola
Whirlpool

Medical equipment and supplies
Boston Scientific Corporation

Public administration
Federal Aviation Administration
NASA Employees Benefits Association

Publishing
Tribune Publishing

Services
Sony Pictures Entertainment

Transportation, communications, electric & gas
American Airlines
Sprint

Technology
Microchip Technology

Contact your MetLife representative or visit Metlife.com/plansmartsolutions for more information about this valuable program.