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: 46%
  - Immediately to one year or more: 50%
  - Never: 4%

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

- Create a budget
  - Already done: 39%
  - Immediately to one year or more: 60%
  - Never: 1%

- Evaluate employee benefits
  - Already done: 32%
  - Immediately to one year or more: 67%
  - Never: 1%

- Create a will, trust, or other estate planning documents
  - Already done: 34%
  - Immediately to one year or more: 66%

Effectiveness of workshop series and speaker

- Would recommend the series: 100%
  - Yes:
  - No:

- Rated their speaker as professional: 99%
  - % excellent/very good:
  - % good:

- Rated their speaker as knowledgeable: 100%

- Rated content delivered by speaker as objective: 99%
  - % excellent/very good:
  - % good:

Attendees plan to retire within

- 0 – 5 Years: 29%
- 6 – 10 years: 22%
- 11 – 19 years: 19%
- 20+ Years: 30%

Results based on feedback provided by 8,065 of the attendees across 773 workshops conducted between January 1, 2017 and December 31, 2017.
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

**Construction**
McCarthy Construction

**Education**
Georgetown University

**Healthcare**
ProHealth Care

**Manufacturing**
Callaway
Con Agra Foods
MillerCoors
Crayola
Whirlpool

**Public administration**
Federal Aviation Administration
NASA/NEBA

**Retail**
Lowe’s
McDonalds

**Technology**
Microchip Technology
Oracle Corporation

**Transportation, communications, electric & gas**
American Airlines
jetBlue

**Nonprofit**
American Red Cross

**Services**
Accenture
Mercedes Benz
Sony Pictures Entertainment

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