



City of Sacramento

Date: September 2022

Presented by: MissionSquare Retirement

MissionSquare
RETIREMENT



50 Years Serving the Public Sector

This year we celebrate 50 years of helping public service employees achieve their retirement goals. And for 50 years our mission has been the same.

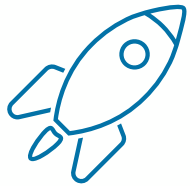
Thank you for letting us serve you.



Invest in a shared sense of service.™



MissionSquare Research Institute



Founded by MissionSquare Retirement in 2007 as a standalone nonprofit



Formally joined MissionSquare Retirement in 2021



Promotes excellence in state and local government workforce research and other public service organizations



Helps employers attract and retain talented public service employees

MissionSquare Research Institute




- Public Plans Database (publicplansdata.org) comparative data on 210 DB plans, plus 51 state-administered DC plans
- Financial Wellness Best Practices and Clinics
- Workforce surveys and other data collection and analysis
- Case studies, focus groups, and leading practices research
- Studies in behavioral economics
- Explorations of policy alternatives
- Practical guides for policymaking and implementation





MissionSquare Research Institute

In the News

- New Research Finds Diversity, Equity, and Inclusion a High Priority for Most Local Governments 
- New Study Finds State and Local Governments Hiring, But Face Acute Challenges Retaining Workers 
- Exodus of Employees is Increasing Strain on Public Sector Workforce According to New Study 



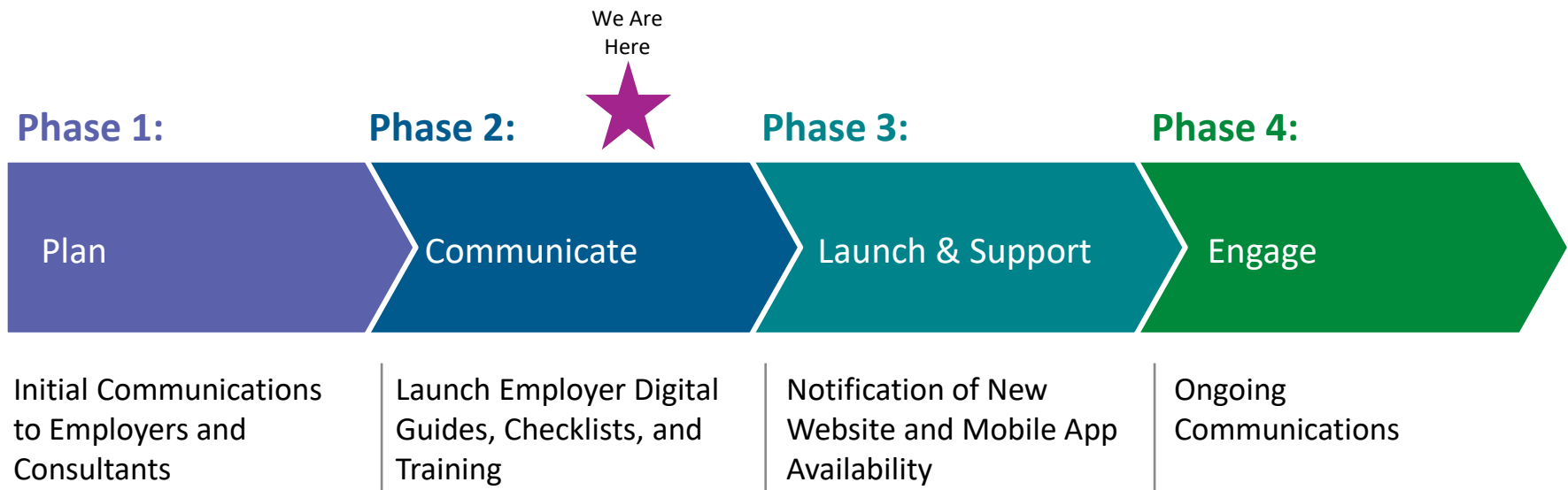
**Digital
Upgrades to
Better Serve
You!**

MissionSquare
RETIREMENT




Digital Upgrades and New Experience

Save the Date! New Experience Targeting Go Live August 29, 2022







Employer Communications

Strategic Updates

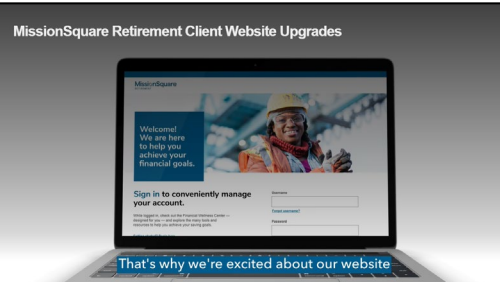


New Client Experience and Technology

- 1 MissionSquare Retirement's Focus and Journey
- 2 New Client Experience and Technology
- 3 What Is Changing and What This Will Mean for You
- 4 Communications and Transition Timeline: Key Milestones in 2022


Videos and Events



MissionSquare Retirement Client Website Upgrades

That's why we're excited about our website

Announcements & FAQs



MissionSquare Retirement to Deliver Upgraded Websites for Clients in 2022

Frequently Asked Questions

MissionSquare Retirement is excited to announce the websites for clients, coming in 2022. We're launching informing employers of the upgrades. And in the fall from us through multiple communications channels, webinars, and more.

At this time, there are no actions required of you

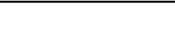
Q. Why is MissionSquare upgrading the employer and employee websites?

A. We've been listening to you and want to make our websites more intuitive and easier to use. This will be marked by state-of-the-art technology and interactive capabilities in upgrading our plan and account access websites.

Q. How will employers benefit?

A. Many of the new features and upgrades we're rolling out are in response to your feedback and include:

- **New website with an improved look and feel** provides enhanced features and updated experience for employers. Online step-by-step instructions will guide you through the process of accessing the new web address to register for first-time access, including obtaining your new user ID and establishing your password and security code delivery preferences.
- **New payroll processes** that will support your current file imports and allow you to easily transition to participant and financial imports with commonly used layout formats, including Excel. Enhanced reporting, fewer clicks, and quicker verification, along with a new tool to import data will help simplify your payroll processing.



MissionSquare Retirement to Deliver Upgraded Websites for Clients in 2022

Dear {{lead.Display First Name:default=Plan Sponsor}},

We're excited to share a significant, new phase in our growth — the upgrade of our plan and account access websites for clients, coming in 2022.

This major milestone comes while we're celebrating our 50th anniversary as the preeminent provider of retirement plans for public service employers and their employees. With one mission, our strong commitment lives on: to ensure those who serve our communities have the tools and resources they need to prepare for their financial future.

You'll find many new features with the upgraded websites, including:

- State-of-the-art technology
- Next-generation website experience

Your employees can look forward to:


- Intuitive account access experience
- New fully transactional mobile app
- Expanded online Financial Wellness Center

[Learn more about the experiences we're creating.](#)

We're here to serve you and your employees with retirement planning services built with you in mind.

Please reach out to MissionSquare Plan Services at (800) 326-7272. If you have any questions. And watch for updates in the coming weeks and months as we progress through this exciting phase designed for you and your employees.

Sincerely,



Lynne Ford
CEO and President
MissionSquare Retirement

More Ways to Connect

Download on the App Store | GET IT ON Google Play

Updates leading up to August 29 launch

Employer Resource Center

Your Guide to the New Technology, Processes, and Services Here to Help You and Your Employees

www.missionsq.org/EmployerResourceCenter

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Explore Your Resource Center

- Overview
- Payroll Processing
- Withdrawals and Loans
- Reporting
- Plan Management
- Participant Website
- Resource Guides

Welcome!

Employer Resource Center

At MissionSquare Retirement, we're excited to tell you about the website upgrades that we're rolling out at the end of August 2022, which will make managing your retirement plans easier and more effective.

Use this resource center as a guide to learn about the new technology, processes, and services that are here to help you and your employees.

This preview of the Employer Resource Center is designed to get you started, with more enhancements to follow over the coming weeks. Watch for more updates!

[Explore Your Resource Center >](#)

Video Preview of New Websites

Watch the video to learn how these upgrades will improve retirement plan management for you and enhance account access for your employees.

Guides to Getting Started

We've created guides to help you navigate your way through the new MissionSquare website. These guides provide overview and instructions aimed to make your initial experiences with the site as easy as possible.

- [Employer Login Guide](#)
- [Employer Overview Guide](#)
- [Coming Soon: Employer Checklist](#)



You'll receive an email announcing your new Employer Resource Center



Participant Communications



- Emails
- Notifications
- Messages
- Mailer
- Landing Page Introductions



Our newly designed digital platform

makes managing your plan easier!



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Welcome
employers!

We are here
to make managing
your plans easier.

Jane.smith@local.gov

Log in to access your
retirement plans.

Our new, more robust employer access provides enhanced features to make your plan management and record keeping more efficient. Get started now! And bookmark this new login page so you can easily locate it next time.

User ID

Password



Online Access

Upgraded with Participants in Mind



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Welcome!
We are here
to help you
achieve your
financial goals.



Sign in to conveniently manage
your account.

While logged in, check out the Financial Wellness Center —
designed for you — and explore the many tools and
resources to help you achieve your saving goals.

[Getting started? Begin here.](#)

Username

[Forgot username?](#)

Password

[Forgot password?](#)



Appendix