

### PLAN SPONSOR

## Automatic Re-Enrollment

### 1st Place Deluxe Corp.

Judges said the “Dream Machine” campaign and Deluxe urging employees to “Dream like you mean it ... Save like you want it. (and) Live like you planned it” were thoughtful, logical and methodical. The goal is to get employees to have 90% income replacement at retirement. Within the campaign, employees were enticed to take educational quizzes to better understand the plan with a chance to win a Visa gift card.



**SERVICE PROVIDER:** J.P. Morgan Retirement Plan Services

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## Conversions

Not for Profit

### 1st Place Henry Ford Health Systems

Henry Ford Health officials did a good job explaining to participants what they had to do during the conversion to a new record keeper. The materials used images that reflected the diversity of the employee base, and the brochure was punctuated with attractive type. Judges called the materials thorough and comprehensive. The use of white space in the design made it easy to read and digest.



**SERVICE PROVIDER:** J.P. Morgan Retirement Plan Services

### PLAN SPONSOR

## Initial Investment Education

Corporate

### 1st Place Sally Beauty Holdings Inc.

Sally adopted the slogan “Your future looks good on you” and presented a colorful, complete brochure that serves as a reference handbook to saving and investing. The program also includes enrollment forms and an easy step-by-step guide to enrolling. The graphics and use of white space are excellent. Judges liked the blurb at the end of the “do-it-yourself” section – if you’re uncomfortable, keep reading.



**SERVICE PROVIDER:** J.P. Morgan Retirement Plan Services

## SERVICE PROVIDER

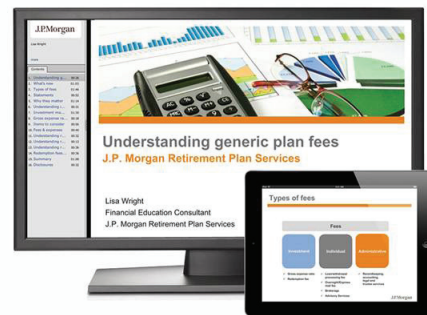
## Fee Disclosure

Generic

## 1st Place

## J.P. Morgan Retirement Plan Services

Judges found “The Way Forward” campaign educational and easy to understand. The colorful graphics were useful in explaining the difference between active and passive fees, as well as other fee issues. Judges said the program was impressive for “using few words to communicate concepts that others used hundreds of words for.”



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CLIENT: Deluxe Corp.

## PLAN SPONSOR

## Special Projects

Corporate: > 5k

## 3rd Place

## J.P. Morgan Chase

“Lose something recently?” participants were asked in an easy-to-read mailer with a single message. The piece was personalized, specifying how much the person was losing by not contributing the full match. A tear-off response card made it easy to take action.



SERVICE PROVIDER: J.P. Morgan Retirement Plan Services

The Eddy Awards, sponsored annually by Pensions & Investments, recognize service providers that provide exceptional investment education to their clients' defined contribution plan participants. The entries were judged on the effectiveness and completeness of their investment education messages, except where noted. These were programs that best educate about, and encourage, sound investment practice. The entries submitted had a clear discussion of such concepts as risk and return, diversification, compounding, the impact of inflation on accumulated assets and the risk and return characteristics of each investment option offered. Successful entries in all categories were creative and had strong identification with the plan sponsor. The entries were accompanied by a litter containing evidence of the effectiveness of the program, e.g. increase in participation or a change in the average asset mix.