

Thanks for joining

Enroll. Take control of  
your future today.

The workshop will start in **10** minutes.

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Enroll. Take Control  
of Your Future Today.

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[Optional Slide]

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### Why partnership matters

**Preparing** for retirement



**34%**  
of Americans have less than \$25,000 saved for retirement;  
**19%** have less than \$1,000



**54%**  
of workers have not done a basic retirement needs calculation



**28%**  
of working Americans feel very confident they will have enough money for a comfortable retirement

Source: EBR 2022 Retirement Confidence Survey.

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## Take advantage of your plan specific benefits

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### Plan highlights – Eligibility

[Insert plan name(s), example: ABC 401(a) retirement plan]

**When am I eligible to enroll in these benefits?**

- ▶ [You are immediately eligible to begin contributing]
- ▶ [You are eligible to begin contributing <insert plan specific details>]
- ▶ [Insert any exceptions to eligibility]

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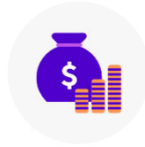
## Plan highlights – Employer contributions

### Employer contributions

- Your employer will contribute an amount equal to [%] of your compensation.

### Matching contributions

- [Employer] matches [xx%] of employee contributions up to [x%] of compensation. We encourage all employees to consider taking full advantage of the match by contributing at least [x%] of their compensation toward retirement. You must contribute to receive matching dollars.



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## Why enroll?

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## Take advantage of starting early

### Why start today?

No matter your age – starting as soon as you can – will give you the benefit of time.

- Elaine started saving for retirement at age 25.
- Mike waited until he was 30 to start.



This example is hypothetical and does not represent the returns from any specific investment. Assumes a starting salary of \$20,000 and 10% contribution rate from respective starting ages to age 60, with 5% average annual return, biweekly contributions and a 4% annual pay increase. Fees and charges, if applicable, are not reflected in this example and would reduce the amount shown. Investing involves risk including the possible loss of principal. Income taxes are payable upon withdrawal.

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## Retirement realities


You could live to be 100... or beyond!



Average life expectancy<sup>1</sup>:  
Men – 83  
Women – 86



Pre-retirement income needed in retirement:  
**80%**<sup>2</sup>



Average annual rise in inflation since 1925:  
**3%**<sup>3</sup>

Sources:  
<sup>1</sup> Benefits Planner: Life Expectancy: SocialSecurity.gov.  
<sup>2</sup> How much money do you need to retire? AARP.com, January 6, 2021.  
<sup>3</sup> Consumer Price Index Data from 1913 to 2021: Bureau of Labor Statistics, Consumer Price Index, June 25, 2021.

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## Plan highlights – Contributions


How much can you save in your plan?



You can contribute up to  
\$23,500 in 2025



"15-year rule"  
catch-up contribution  
\$3,000 annual limit  
For participants who  
have under contributed  
in the past and have  
15 years of service with  
eligible employers



Age-based  
catch-up contribution  
Up to \$7,500 in 2025  
For participants age  
50 or older

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## Investment options

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## Investment options

- 01 Risk you can bear
- 02 Time horizon
- 03 Asset allocation
- 04 Diversification

Neither asset allocation nor diversification ensure a profit or protect against market loss.

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 Your financial professional can assist you based on your personal situation.

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## Why choose Corebridge

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## Tools and resources

Do you know what Corebridge can offer you?

Every day, we work hard to make it possible for more people to take action in their financial lives – because action is the bridge from planning to outcomes, from today's financial needs to tomorrow's aspirations.

<b>Personalized service from a financial professional who can:</b> <ul style="list-style-type: none"> <li>Help you prioritize your goals</li> <li>Identify risks to your retirement income</li> <li>Determine the financial strategy and time horizon needed to achieve your goals</li> </ul>	<b>Retirement Pathfinder®</b> <ul style="list-style-type: none"> <li>A personalized interactive retirement income planning tool that illustrates retirement scenarios to optimize saving strategies to meet your goals</li> </ul>
<b>Student debt forgiveness program</b> <ul style="list-style-type: none"> <li>Determine qualification for student loan forgiveness</li> <li>Identify potential savings</li> <li>Navigate through enrollment</li> <li>Maintain eligibility</li> <li>Provide a clear path to applying for full forgiveness</li> </ul>	<b>Account access anywhere:</b> <ul style="list-style-type: none"> <li>Use the Corebridge app to get customized analysis of your account</li> <li>Access to online financial calculators and other powerful planning tools at <a href="https://corebridgefinancial.com/retirementservices">corebridgefinancial.com/retirementservices</a></li> <li>FutureFIT University</li> </ul>

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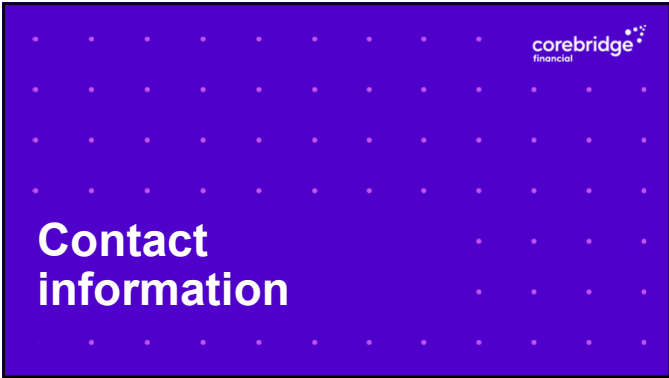
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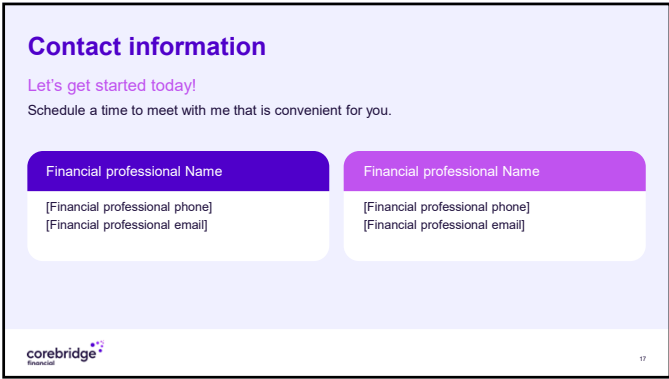
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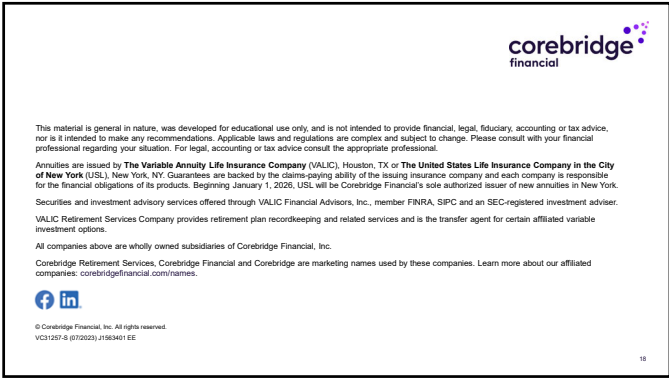
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