

PROPOSAL

A **genZretires** Initiative

TO JOIN

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BUSINESS BENEFITS

- *Flow of RFPs in sectors with heavy recruiting and regions with high Generation Z density*
- *Wins among cases with a young and growing workforce*
- *Recognition for industry leadership in executing communication strategies to reach Generation Z*
- *Knowledge – direct input from Generation Z revealing goals, needs and behaviors*
- *Content and thought leadership*

From this initiative you will benefit from receiving content for:

- Communications with plan participants, plan sponsors, advisors, and the general public
- Blog posts and social media
- Presentations at industry conferences
- Idea generation with peers internally at your company

RECOGNITION

- Company name in news release
- Company name in Social Media posts
- Logo on the GenZRetires website
- Contact information on the one-page project description posted on the GenZRetires website

DELIVERABLES

- Report of Survey results including graphs, charts, and infographics
- Attendance at a webconference presentation of study findings

APPROACH

- *Survey of 2000 members of Generation Z and tail-end Millennials*
- *Four age bands: 16-17, 18-19, 20-21, 22-23*

Gain insights into the minds and habits of Generation Z:

- How they spend their time
- What electronic devices they use
- What social media they prefer
- Who influences their decisions
- Life and World issues that concern them most
- What they know about personal finance
- What personal financial assets, accounts, loans, and credit cards they have
- Their sources of income
- Their thoughts on saving for retirement
- Their knowledge of 401(k) plans

QUANTITATIVE METRICS

- Set baseline measures
- Assess progression with age

TIMELINE FOR EXECUTION

Task	Completion Date
Draft questionnaire	April 27
Finalize questionnaire	May 24
Field survey	June 7
Close survey	June 20
Tabulate results	June 27
Presentation Webconference	July 5
Deliver slide deck with graphs, charts, and infographics	July 25
One-page description including credits (final)	July 27
New s release and social media posts	August 2

PRICING

The price to receive study results is \$1600. Invoice upon acceptance of proposal. Payment terms net-30 days.

QUALIFICATIONS

EACH Enterprise is a proven leader in providing PR based marketing solutions to organizations in the retirement plan industry. Since 2007, EACH Enterprise has been organizing roundtables and studies to support participant strategy in the retirement plans sector. EACH Enterprise is esteemed for its thought leadership and collaborative approach to solving industry problems.

In addition to delivering in-depth research and organizing topic-rich conferences for retirement plan service providers, EACH Enterprise manages two advocacy organizations for the industry.

- The Retirement Advisor Council advocates for successful retirement plan and participant outcomes, documents the benefits plan sponsors gain from partnering with a professional retirement plan advisor, and promotes among CFOs and HROs the business benefits they can reap from partnering with an outstanding advisor.
- GenZRetires sets Generation Z on a course to achieve 99.7% retirement success by age 70. GenZRetires is a multi-year, multi-company initiative combining research and a range of communication activities directed to young people through messaging channels they use most, in the format they like best.

