

# Case Study

Salvation Army Southern Territory and AIG Retirement Services work together to “do the most good”



“VALIC<sup>1</sup> assembled an experienced team to focus solely on communicating a major retirement plan change to employees in multiple locations. They covered what needed to be delivered for compliance purposes, as well as what had to be mentioned for understandability. VALIC developed a communication plan designed to touch our employees 13 times over a 12 week period, including emails, webinars, video, direct mail, 800 phone lines, etc. And during the 30 days prior to the change VALIC conducted 100 live meetings in 62 locations. All of this was outlined in advance on a project timetable that accommodated our internal operations.”

— Robert L. Albright, JD, MBA,  
LLM Pension & Retirement  
Operations Manager

## Opportunity

The Salvation Army Southern Territory, a mainstay of charitable good works, sought a retirement plan provider that could administer its multi-layered program while working closely with the Army to fulfill its vision of the best program possible. Thus began an eight-month transition process that included two on-site meetings (one at AIG Retirement Services’ office in Houston, a second at Salvation Army headquarters in Atlanta) and weekly implementation calls.

## Challenges/Objectives

Salvation Army Southern Territory asked to be involved in every aspect of their program transition so things would be done precisely to their specifications. The group was actively engaged with AIG Retirement Services to ensure that plan communication be customized to match their unique voice.

The Army wanted plan changes on their existing 403(b) plan communicated to employees along with specific information on the transition. They also provided insight regarding the staff’s varying levels of education, so we could create an effective communication strategy.

The Southern Territory of The Salvation Army organization stretches from Texas to Florida — a wide sweep of land to cover with local group meetings. But AIG Retirement Services did it, holding more than 100 small group meetings, and also arranging one-on-one personal counseling sessions to meet with Salvation Army staff individually. AIG Retirement Services connected to Salvation Army staff in easy-to-understand language using:

- Emails, with embedded videos
- Flyers and handouts
- Plan highlights
- New hire presentations
- Posters announcing local meetings

<sup>1</sup> VALIC will now be known as AIG Retirement Services.

## Case Study: Salvation Army Southern Territory

### Strategy & Tactics

Intensive communication was key to a successful transition and ongoing retirement plan administration. AIG Retirement Services created a custom employee engagement strategy for pre-communications, during the transition and going forward. Hallmarks of the communication strategy included the following:

- Program highlight videos featuring The Salvation Army Southern Territory's Chief Secretary
- Workshop-style, in-person meetings with the plan sponsor
- Weekly calls over the eight-month transition period
- Quick access to all employee transition materials through the creation of a custom website, [aig.com/RetirementServices](http://aig.com/RetirementServices)
- Ongoing communication materials that promote retirement readiness & financial literacy

### Impact

Working together, AIG Retirement Services and The Salvation Army Southern Territory energized employees to re-engage with their retirement plan. Capturing key metrics of the comprehensive communication and education program, AIG Retirement Services has been able to determine that more than 50% of The Salvation Army plan participants attended plan transition meetings during the implementation phase.

As with all our plan sponsors, we continuously work with The Salvation Army Southern Territory to find solutions that drive results. So, let's talk about what AIG Retirement Services can do for your organization!

### Envision **MORE** with AIG

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