



# Evaluating the Results

## BENEFICIARY ELECTION CAMPAIGN.

### Relevant campaign motivated participants to act

#### **OPPORTUNITY:**

A global manufacturing company with over 6,500 participants and over \$500 million in Plan assets wanted to increase the number of participants with beneficiary information on file.

#### **GOAL:**

Motivate participants to choose beneficiaries for their plan account.

#### **AUDIENCE:**

The campaign targeted all participants with a balance.

#### **RESULTS:**

983 participants made a beneficiary election (including 541 online and 356 by mail).  
13% total increase in participants with beneficiary information on file.

#### **SOLUTION:**

An election-themed:

- **Multichannel campaign**, which included an email, letter, brochures with election forms, posters with beneficiary forms and mirror clings for offices.
- **Beneficiary election contest to motivate action**, with awards for randomly selected participants who elected beneficiaries during the campaign.

**Few things are so important.** Or so easy to take care of.

Peace of mind is priceless. And that's what you get when you name a beneficiary for your 401(k) Plan account. It's a simple action you can take to make sure your 401(k) Plan account balance will go to the person you choose in the event of your death. In this election year, take a minute to elect your beneficiary. It's important, and you don't even have to stand in line!

**WE'RE WITH YOU**  
T. Rowe Price can help with all stages of your financial life. Visit us online at [rps.troweprice.com](http://rps.troweprice.com). Or give us a call at 1-866-237-8524.

**HOW TO WIN**  
If you elect your beneficiary by November 8, 2016—or if you already have a beneficiary on file—you'll automatically be entered to win one of these prizes:  
fitbit iPad A pair of airline tickets donated by UNITED

Drawing on November 30, 2016. Winners will be notified.  
**Name your beneficiary today.** Return the attached form in the enclosed postage-paid envelope, or log in to your account at [rps.troweprice.com](http://rps.troweprice.com).

Fitbit is a registered trademark of Fitbit, Inc. and/or its affiliates in the United States and other countries.  
iPad is a registered trademark of Apple, Inc.

**Ready? Name your beneficiary here.**

I name the following person as my primary beneficiary:

My information:	
First Name	Last Name
Date of Birth	Last 4 Digits of Social Security Number
Address	
City/State/ZIP Code	
Relationship: <input type="checkbox"/> Spouse <input type="checkbox"/> Non-spouse <input type="checkbox"/> Entity	

Please note that by naming this individual as your primary beneficiary, your entire vested account in the Incorporated 401(k) Savings Plan will be paid to this individual upon your death.

I understand that I can make changes to my beneficiary designation at any time. Visit the website at [rps.troweprice.com](http://rps.troweprice.com), or call T. Rowe Price at 1-866-237-8524.

Participant Status:  Single  Married

If your primary beneficiary is not your spouse, if you are married, your primary beneficiary is typically your spouse. If you wish to name someone other than your spouse (requires a notarized spousal consent signature) or more than one beneficiary, you must complete a Designation of Beneficiary Form. You can download the form at [rps.troweprice.com](http://rps.troweprice.com), or call T. Rowe Price at 1-866-237-8524.

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Hurry—you must elect your beneficiary by November 8, 2016, to be entered in the drawing. If you already have a Plan beneficiary on file, congratulations, you're automatically entered.

Drawing will occur on November 30, 2016. Winners will be notified.

Name your beneficiary today at [rps.troweprice.com](http://rps.troweprice.com).

**ELECT YOUR BENEFICIARY TODAY!**

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**ELECTING YOUR BENEFICIARY IS EASY**  
Online: [rps.troweprice.com](http://rps.troweprice.com)  
Mail: Forms can be picked up from on-site posters.

**DON'T WAIT.**  
Name your beneficiary by November 8, 2016 for a chance to win. See posters for additional details.

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**Elect your beneficiary today!**

**FEW THINGS ARE SO IMPORTANT—OR SO EASY TO TAKE CARE OF—THAT WHEN YOU NAME A BENEFICIARY FOR YOUR 401(K) PLAN ACCOUNT, SEVERAL GREAT THINGS HAPPEN:**

- You gain peace of mind, knowing your account balance will go to the person you choose.
- You get a chance to win one of these great prizes:

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