



Evaluating the Results

M&A CONVERSION CAMPAIGN.

Encouraging participants to act during a time-sensitive conversion

OPPORTUNITY:

A large professional services company Plan with over 11,000 participants and over \$1.3 billion in plan assets acquired a company with over 2,400 employees. The acquired company's 401(k) plan was terminating, and the plan's participants needed to elect a distribution option for their savings.

GOAL:

Motivate participants to make a distribution election for their account in the terminating plan and educate them about the options in their new plan.

AUDIENCE:

The campaign targeted all participants with a balance in the terminating plan.

RESULTS:

With **FAQs and on-site support**, Human Resources was equipped to answer complex questions
49.5% of eligible participants rolled over their savings to the plan at T. Rowe Price

SOLUTION:

T. Rowe Price assisted the client during a turbulent time by delivering comprehensive education on time:

- **Detailed communications package** that informed participants about the conversion and provided all necessary paperwork they needed to make their distribution election.
- **Support for the client's Human Resources staff** by creating FAQ documents and answering participant questions during on-site meetings.
- **Direct phone calls** to terminated participants to provide additional assistance.

