



T.Rowe Price

## SmartVideo

# Personalized videos for better results

Every participant's retirement journey is unique. Their plan experience should be, too.

We deliver personalized experiences so participants see the meaningful content they need to feel confident about their next steps.

By incorporating real-time data into engaging, personalized videos, the SmartVideo suite has been proven to motivate participants to take positive actions for their future. Based on the participant's information, each video automatically shows the most relevant and important calls to action for that individual.

**2x**

SmartVideo viewers are 2x more likely to increase their deferral rate than nonviewers.\*

Personalized | Dynamic | Engaging | Proven

## The SmartVideo Suite

### Post-Enrollment

Sets up participant for success by encouraging critical next steps.

#### Topics include

- Current savings rate versus 15% goal
- Auto-increase
- Beneficiary designation

### Account Check-In

Highlights positive actions participant has taken and suggests next steps.

#### Topics include

- New year and midyear account summaries
- Investment allocation
- Financial wellness
- Comparison of target savings rates based on participant's age and salary
- Achievements over the past year (e.g., loan payoff, beneficiary designation, etc.)

### Retirement Income

Provides actions participant can take to improve their outlook.

#### Topics include

- Income projections at increased saving rates
- Employer match (if applicable)
- Targeted content for highly compensated employees

### Retirement Plan Features

Promotes key benefits and features of the participant's plan.

#### Topics include

- Enrollment status, eligibility, and/or auto-enrollment date
- Plan-allowed contribution types, participant's current contributions, and plan or IRS limits
- High-level loan and vesting information

## Guidance when they need it the most

A shorter SmartVideo is strategically built into the transaction experience, giving participants personalized guidance when they're ready to take action.

### Contribution Change

Located on the Change Contribution page, this SmartVideo shows participants who are saving at a below-average rate the importance of saving more.

- Offers messaging if retirement goal is on or off track
- Compares current deferral rate with suggested deferral rate
- Discourages change if participant is on track



### Spanish Closed Captioning

Feature is available in SmartVideos, ensuring even more of our participants can take positive actions for their future.



### What's Next?

New SmartVideos offering personalized information on distributions and account security.

## Let's drive outcomes

Contact your T. Rowe Price representative to learn more about SmartVideo and how our personalized participant experiences achieve better results.

\*Results based on 62,682 SmartVideo Account Check-In viewers from January 1, 2023, through December 1, 2023. Deferral results do not include participants using the auto-increase service. Results are sourced from TRPEvents dataset within Adobe Data Workbench and compared with a control group of participants with similar eligibility and account characteristics. Source: Ignitio/T. Rowe Price.

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