Employee Education & Communication Offerings

mgo Educating Your Participants

Plan Overview Meeting

- For all participants in a group setting
- Discuss the value of saving for retirement
- Review the plan features and investment options
- Review of any changes in plan features
- Review of any changes to the plan's core investment menu
- Discuss structuring a portfolio relative to MGO's market forecast
- Brief market update

Web Access Workshop

- For all participants in a group setting to review the plan's web functionality
- How to check account balance
- How to make exchanges and future allocation changes
- Review investments and performance
- Review personal rates of return
- Run projections for income in retirement based on replacing a percentage of current income
- Calculate savings required to cover future college expenses
- Obtain past participant statements

Enrollment / Individual Consultations

- One-on-one meeting between participant and MGO representative,
- Ability to discuss retirement goals / financial concerns specific to the participant,
- Confidential setting for the participant,
- Assistance with completing all paperwork for plan sign up.

Retirement Readiness

- Meeting for participants age 50+
- Learn how to explore retirement goals,
- Learn the economics of retirement income,
- Suggest strategies for investment allocations as retirement nears,
- Learn how to avoid the problems that result from changing focus from 'accumulation' to 'distribution.'