

# Take Part In LEGACY DAY

Friday, 04.01.2016

How are you ensuring that your employees are focused on their “Legacy”? Are your employees contributing enough to their retirement accounts to be able to retire comfortably? Is your plan setup to encourage them to be able to do so? Do you have all of the latest features that are available?

If the answer is “no”, fear not. **Legacy Day** is a call to action. It is an opportunity for employers to help their employees move toward achieving their financial goals.

On **Legacy Day**, we challenge you to add features to your retirement plan that encourage appropriate investing behavior for your employees. “Auto-Enrollment” and “Auto-Increase” are just a few of the newer features that are available to employer-sponsored retirement plans. If you are not utilizing these features, be sure to ask your advisor how they can enhance your plan.

69%

**PERCENTAGE OF EMPLOYEES WHO EXPECT TO WORK TO OR BEYOND AGE 65**

*SOURCE: EMPLOYEE BENEFIT RESEARCH INSTITUTE, MATHEW GREENWALD & ASSOCIATES, INC., 2016 RETIREMENT CONFIDENCE SURVEY*

91%

**PERCENTAGE OF EMPLOYEES WHO REMAIN IN PLANS THAT UTILIZE AN AUTO-ENROLLMENT FEATURE**

*SOURCE: VANGUARD, 2014.*

Patrick Stuhr  
Partner

[pstuhr@legacy401k.com](mailto:pstuhr@legacy401k.com)

817.729.6410

Brad Grist  
Partner

[bgrist@legacy401k.com](mailto:bgrist@legacy401k.com)

214.998.3556

