



Episode 44: Effective Participant Communication Matters

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On this episode of *Revamping Retirement*, [Jennifer Doss](#) and [Scott Matheson](#) talk with Debra Gates, CAPTRUST manager of [advice & wellness](#). Debra shares her thoughts on why employees are increasingly looking to employers for guidance on financial wellness and retirement readiness. She also talks about why effective communication requires plan sponsors to carefully consider the demographics of their employee population and adapt their approach for different participant groups.

As the classic view of retirement evolves, Debra discusses how new strategies, media, and initiatives can drive good behavior to help employees get on track—and stay on track—to reach their personal financial goals.

Later, [Mike Webb](#) reviews the potential plan sponsor pitfalls of grandfathering in Minute with Mike.

Mentioned in the Podcast

In a recent CAPTRUST webinar, Debra takes a deep dive into best practices for participant communications. Along with [Barry Schmitt](#) and Mike Webb, she addresses the following questions:

- How do volatile markets impact participant communications?
- How often should plan sponsors communicate with employees?
- What are the most effective media for communicating with participants?
- What are the fiduciary obligations for communicating with plan participants?

Click [here](#) to watch the webinar.

Episode 42: Dr. Shlomo Benartzi discusses the success of his revolutionary Save More Tomorrow program, the future of auto-features, and how plan sponsors can use choice architecture to help



move the needle with participants.

Click [here](#) to listen.

Episode 37: In today's competitive labor market, many organizations are focused on culture and benefits as differentiators. But when it comes to diversity, equity, and inclusion (DEI), checking the box isn't enough. We chat with Rosalyn Brown—the equity, diversity, and inclusion director for WE Inspire. Promote. Network. (WIPN)—about the importance of looking at your retirement plan benefits through the lens of DEI.

Click [here](#) to listen.