

Financial Literacy Campaign March 2021





- We'll host the myMoney Challenge again this year
 - Designed to encourage employees to take small, positive steps toward financial literacy and wellbeing
 - Entering gives employees a chance to win a \$50 gift card
- Last year, 98 percent of participants said it helped improve their financial understanding
- This year's theme: Step by Step





- Employees will receive a weekly email for five weeks beginning Monday 3/29
- Emails will link to the website with articles and challenges
- Content tailored to one theme each week
- Past content is included in the archive
- Also links to Merrill's webinars and our financial wellbeing resources



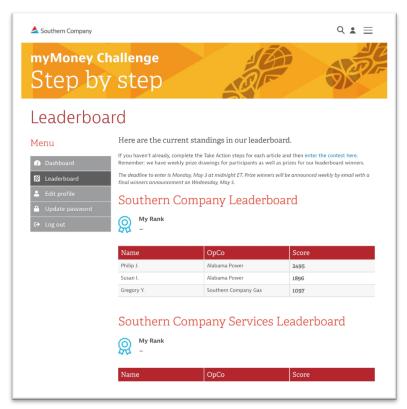
- Take Action challenges give employees a chance to enter the contest
- Learn More options are tailored to three age brackets







- New this year, participants will be able to see their total quiz scores on a leaderboard with all other participants.
 - First Name, Last Initial
 - OpCo
 - Total Score
- Winners will be randomly pulled from OpCos and ERGs





Educational content

Weekly topics include:

1: Assess

Assess where you are and understand what actions you can take to improve your financial wellbeing.

2: Strive

If you're ready to name and reach a financial goal, there are steps you can take to reach your goal – whatever it is.

3: Invest

Investing is a longer-term, and potentially higher reward, strategy than saving. Here are the basics and beyond.

4: Plan

Putting a retirement plan in place now, while you're still working, can help you start preparing for your ideal future.

5: Protect

Insurance, ID theft, and estate planning can help you stay protected at all levels in your life.



myMoney Podcast

Each week's content includes our new podcast

- Five episodes, introduced weekly
- Each episode relates to the theme of the week
- Podcasts are not publicly available





Take-action challenges

Each week will include several take-action challenges

- Challenges are optional: Complete as few or as many as you choose
- Challenges include:
 - Run Merrill's Financial Wellness Tracker
 - Access content available on our vendors' websites (Merrill, Ayco, etc.)
 - Other materials of interest



Timeline

Five-part campaign March 29 to May 5

Emails distributed with link to each week of content:

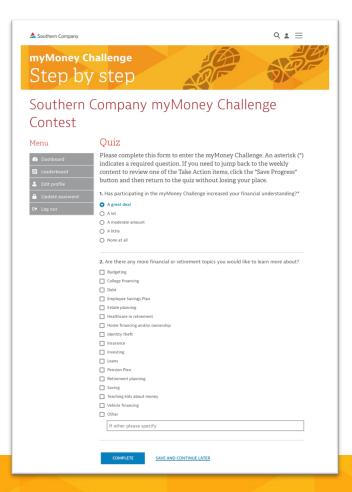
- Week 1: March 29
- Week 2: April 5
- Week 3: April 12
- Week 4: April 19
- Week 5: April 26

- Contest closes: May 3 at midnight ET
- Prize winners announced: May 5

Prize drawings

- Complete and record challenges via quiz on website
- For an extra entry, submit a testimonial or short selfie video
- Last chance to enter is Monday, May 3, at midnight ET





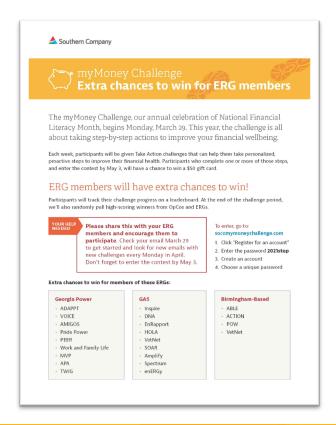


Campaign promotion

- Promotional article for Southern Today, mySOurce and CIB
- Promotional flyer to ERG leadership
- Weekly email to employees to push them to the website

To enter on March 29, go to: socomymoneychallenge.com

- Click "Register for an account"
- Enter the password 2021step
- Create an account
- Choose a unique password





Analysis and evergreen content

By collecting contest entries via surveys, we'll be able to analyze:

- Percentage of employees who participate
- Demographics of employees who participate
- Areas of engagement, which will help us focus future educational efforts

Articles and other resources available via the website after campaign ends