



**BOOGIE ON DOWN TO REMOTIV AND REALIZE YOUR RETIREMENT VISION**



# Who is Remotiv?

Remotiv is a retirement readiness benefit provided to you by San Mateo County.

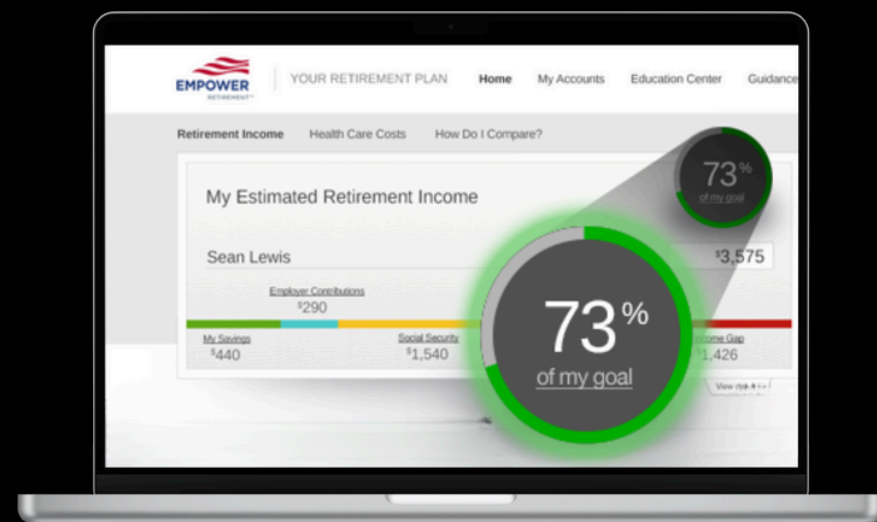
Our services are here to help you better prepare for retirement by providing you with personalized insights about your overall retirement readiness health and make personalized suggestions to help you improve your savings outlook.



One critical differentiator about the Remotiv benefit is our conflict-free positioning. Remotiv **NEVER** sells any investment products, nor earns commissions when making investment recommendations. Remotiv's **only goal** is to provide personalized guidance that helps **you save more, and save better** so you can reach your retirement vision.

### What you can expect when you sign up:

- Annual personalized retirement readiness report delivered right to your mailbox containing details about your retirement readiness
- Personalized savings and investment recommendations
- Online Remotiv Portal where you can further customize your projections
- Additional insights that can be used to personalize your Empower Lifetime Income Score



# GET THE SKINNY ON YOUR RETIREMENT READINESS (RR) SCORE

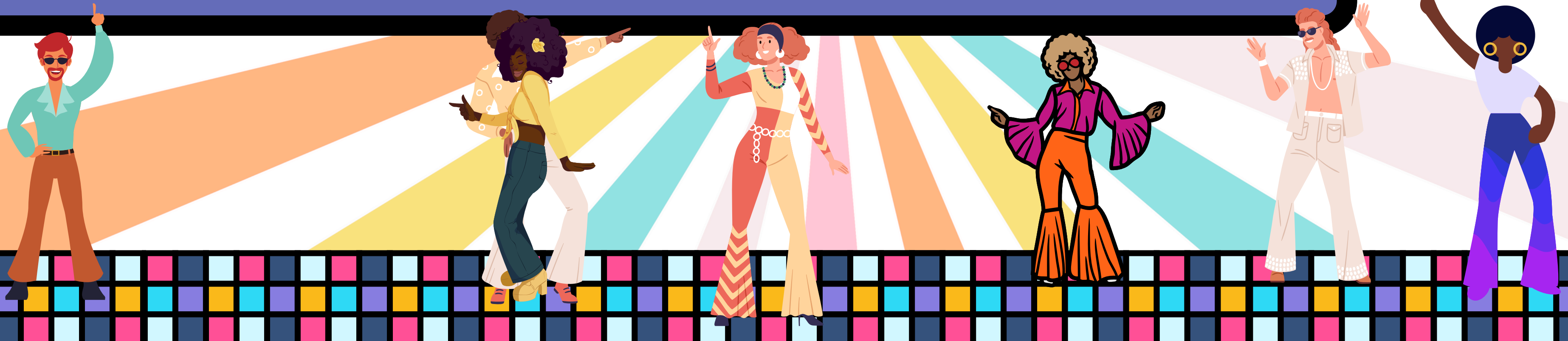


## Retirement Readiness (RR) Score:

A score from 1-10 that can help you determine how on track you are to reach retirement readiness. A score of 7.5 and above is considered “on track.”

## How is the RR Score calculated?

Using information provided by your employer, we are able to estimate how much income you may need in retirement and how much you will need to save to achieve that target.





# A RETIREMENT SAVINGS PLAN IN THE PALM OF YOUR HAND

*YOUR PERSONALIZED RETIREMENT READINESS REPORT INCLUDES:*

- *YOUR RETIREMENT PROFILE*
- *RETIREMENT READINESS (RR) SCORE*
- *CURRENT AND SUGGESTED SAVINGS STRATEGY*
- *SAMCERA PENSION ESTIMATE (IF APPLICABLE)*
- *PERSONAL GUIDANCE*
- *ACTION STEPS*



# ONE FLY PORTAL!

1

## Personalize your RR Portal

Update your profile and adjust default settings to improve accuracy of your retirement readiness projections.

2

## Retirement Mindset

Customize your retirement income goal using the Retirement Mindset feature. Whether you want to downsize in retirement, work part time, or travel the globe, it's important to know how your desired lifestyle expenses can impact your retirement planning.

3

## Savings Strategies

Check out your current vs suggested savings strategy and see how Remotiv's recommendation can help you improve your RR Score and retirement readiness.

4

## Income in Retirement

Calculates withdrawal schedules available throughout retirement years from different income sources like SamCera and drawdown strategies giving you critical insights into estimated cash flows

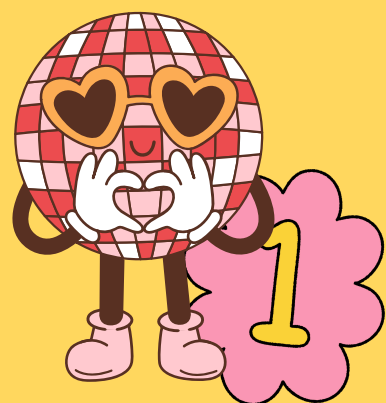
The screenshot shows the Remotiv retirement portal dashboard. It includes a profile section with fields for Current Age (34 years old), Current Salary (\$121,410), Retirement Age (62 years old), and Retirement Income Goal (88%). A 'Retirement Mindset' section allows users to 'Select my Persona'. A 'Strategy Comparison' table compares 'Current' and 'Suggested' strategies for various contributions and risks. A 'Projected Income in Retirement' section shows 'Current Strategy' and 'Suggested Strategy' with a monthly income goal of \$15,197. A 'Retirement Income Goal' section provides a breakdown of the budget, showing a need for \$9,205 per month after accounting for Social Security and pension. A 'Projected Account Value at Retirement' section compares 'Current Strategy' (\$1,400,239) and 'Suggested Strategy' (\$1,891,285) under different market conditions. A 'Key Takeaway' section states 'Good to Great!' and provides a final note on the importance of contribution rates.

	CURRENT	SUGGESTED
San Mateo County 457 Plan		
Employee Pre-Tax Contribution	\$95	\$150
Employee Roth Contribution	\$955	\$1507
Employer Match	\$304	\$304
Portfolio Risk (1-10 Scale)	7.2	8.2

Strategy	Weak Market Conditions	Strong Market Conditions
Current Strategy	\$728,042	\$2,523,316
Suggested Strategy	\$1,006,105	\$3,315,346

**TO ENROLL...**

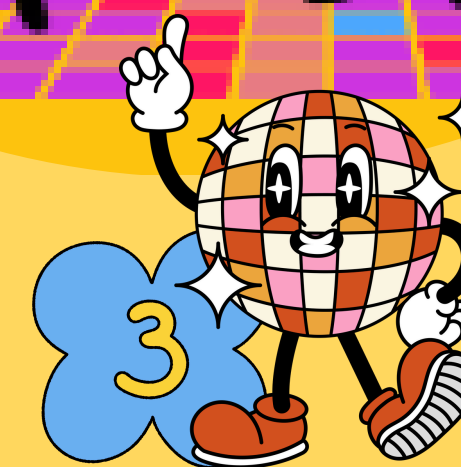
*SIGN UP DURING OPEN  
ENROLLMENT TO RECEIVE  
YOUR PERSONALIZED  
RETIREMENT READINESS  
REPORT*



**Log in to your  
County of San Mateo  
workday site**



**Under "Additional  
Benefits" select  
"Remotiv"**



**Click "Select" and  
then "Confirm and  
continue"**



***WE CAN'T HELP YOU DANCE ANY BETTER.  
BUT WE CAN HELP YOU PLAN AND  
SAVE FOR RETIREMENT!***