

# 5 tips

## for a successful lump-sum window

Thinking about offering a lump-sum window?  
Set your organization up for success with these five tips.

- 1 Identify your window participants and check your data.**  
Do you have reliable address and beneficiary data for all eligible participants? It's also important to have thorough plan records. If there is incomplete information, such as unclear work history, start early so you have time to resolve issues or exclude participants from the window.
- 2 Make sure participants know the window is coming.**  
Before the window period starts, let participants know what to expect before they receive a packet full of details. Send a short teaser announcement to raise interest and awareness.
- 3 Encourage participants to open the package.**  
Design your mailing envelope to include a call to action. For example, including the deadline date can draw attention to the opportunity.
- 4 Keep it compliant and easy to understand.**  
Election packages are rarely page-turners. There's a good deal of required information and disclosures to review. Including an easy-to-read decision guide that features illustrations or graphic design can increase understanding.
- 5 Enhance the election process.**  
Once someone has read the information and reached their decision, the next step is documenting and returning their election. An online election portal can capture information in real time and minimize chance of error. Paper election packages can include helpful checklists to make the process as foolproof as possible. Providing participants with additional information on where they can receive financial advice and planning support can also help them make decisions.

### Let's talk

To find out more contact us at **1 866 355 6647** or **talktous@buck.com**.  
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