



Concordia Retirement Savings Plan 403(b)

AutoSave Implementation: Communication Checklist

Use this checklist and the provided templates to guide your worker communications as you implement AutoSave at your ministry. This communication schedule is a suggestion and can be adjusted to fit your timeline (other than the required 30-day notice).

AutoSave Election

We will help you complete an election form and outline AutoSave details and employer responsibilities.

Launch date: _____

6 Months before launch

First Worker Email

Send an introductory email to your eligible workers using the provided template to announce AutoSave.

Send date: _____

3 Months before launch

Second Worker Email

Send a reminder email to your eligible workers using the provided template to share AutoSave information and opt-out instructions.

Send date: _____

1 Month before launch

Required Notice

Send the **required 30-day notice** to your eligible workers, reminding them of the program specifics and opt-out instructions.

Send date: _____

Launch

Announcement Email

Send your eligible workers the official AutoSave launch announcement using the provided template.

Send date: _____

For more information visit ConcordiaPlans.org/AutoSaveToolkit.