

Secure your future – it's never too late to start



UCT RETIREMENT FUND

## Member Communication Strategy



UNIVERSITY OF CAPE TOWN  
IYUNIVESITHI YASEKAPA - UNIVERSITEIT VAN KAAPSTAD

**Last updated 12 August 2013**

## YEAR PLANNER

It is proposed that the following projects be launched throughout the year:

Project	Date	Media
RSS Feeds (with all new posts on website)	Ad-hoc	Website
Voting poll, scrolling banner, advert icons	Monthly	Website
Loading of Annuity Rates on Pension Indicator on Fund website	Monthly	Website
Financial Literacy Articles ('free' articles presented to the PO for approval)	Monthly	Website Consider email
Investment factsheets	Monthly	Website
Website changes (loading documents, e-book changes, design requests, etc.)	Ad-hoc	Website
Change the set of top Frequently Asked Questions on homepage of website	Monthly	Website
Ad hoc rule amendments and other Fund events	On Request	Communications/Trustee meeting
Service Level Reports	Quarterly	Communications meeting
Newsflashes	Ad-hoc	Email
Newsletter: AGM, IPS, website hits (to entice to RFW), switches, new Assistant PO and rule changes	August	Website Email

<p><b>IPS (how Trustees select portfolios, process followed, general investment principles and summary of portfolios)</b></p>	<p>August</p>	<p>Website Email</p>
<p><b>Living Annuitants newsletter to accompany personalised letter: AGM, website hits, what is a living annuity and costs, rule changes, inception date corrections, annual income adjustment letters, tax on annuities, investment returns, trustee elections, new Assistant PO, switches, nomination form and IPS</b></p>	<p>August</p>	<p>Post</p>
<p><b>Trustee election notice: AGM, meet your current trustees, about voting and duties and responsibilities of trustees</b></p>	<p>August</p>	<p>Website Email</p>
<p><b>Trustee Election 2013</b></p>	<p>August to November</p>	<p>Posters Website Email August newsletter</p>
<p><b>AGM</b></p>	<p>September</p>	<p>Posters Website Consider newsflash August newsletter Slides</p>
<p><b>Newsletter: post-AGM: mainly investment returns and any issues raised at AGM</b></p>	<p>September</p>	<p>Website Email</p>
<p><b>Corporate Governance Report and Section 51 Manual</b></p>	<p>September</p>	<p>Website</p>

		Email
<b>Nomination of Beneficiary Forms</b>	September	Website Email
<b>Newsletter: Investment returns, reminder of nomination of beneficiary form, reduced cover (death-in-service) and announce new BoT</b>	November	Website Email
<b>Newsletter: Thank outgoing BoT, welcome new BoT (announce Chair and Vice and more info later), benefit statements and investment returns</b>	After December BoT	Website Email
<b>Provide a new year planner 2014/5 and relevant budget</b>	After December BoT	Communication/Trustee meeting
<b>Benefit statement packs</b>	February	Benefit statement assist Cover letter Road show info Switch forms
<b>Update Trustee information with Pictures and Biographies</b>	February	Website Consider newsflash
<b>Newsletter: Investment returns, new BoT, RFW registrations, member road show reminder</b>	February	Website Email
<b>Member Road Shows</b>	March	Posters Email (prior and during) UCTRF website Monday Paper UCT website



	HR Advisor prompts	
<b>Newsletter: Member road show (highlights), benefit statements, national budget speech</b>	April	Website Email
<b>Retirement Planning Seminar promotion</b>	May	Website Email
<b>Newsletter: Investment returns, investments (portfolios), reminder and link to retirement planning seminar</b>	May	Website Email