



### **WDC Enhancements**

In addition to offering excellent customer service and the same features as the WDC currently enjoys, Great-West will be providing:

- additional field staff, for a total of 10 staff dedicated solely to the WDC;
- expanded customer service telephone hours to 7 am to 7 pm;
- revised and updated materials, including all forms and brochures and the Web site;
- a personal rate of return on participants' quarterly statements; and
- electronic submittal of employer payroll data via the Internet.

### **Transition Communication Efforts**

With help from Department staff, Great-West's transition team planned and executed a comprehensive education and information campaign intended to communicate details regarding the WDC transition to all participants and employers. The plan included the following:

#### For Participants

- An initial letter announcing the WDC transition to Great-West was mailed to all participants on September 16, 2005. A second communication was mailed to all participants on September 30, 2005. This mailing included a detailed transition bulletin outlining important dates of the transition, a WDC fund listing with performance information and a listing of group meetings.
- Great-West scheduled over 70 participant meetings around Wisconsin from October 10 through November 18, 2005. At these meetings, participants were provided with an overview of the changes occurring as a result of the transition, as well as a reminder of services that are not changing.
- The lead article in the October 2005 WDC newsletter, *MoneyTalks*, provided an additional reminder to participants of the recordkeeping transition.
- A link to the Great-West transition Web site was added to the current WDC Web site ([www.wdc457.org](http://www.wdc457.org)). Copies of all materials mailed to participants can be found here.
- The new toll free telephone number for participants, 1-877-457-WDCP (877-457-9327) is open and call center staff is available to answer questions regarding the transition.

#### For Employers

- To help explain the payroll processing changes occurring with the transition, Great-West developed and distributed a customized payroll guide on processing changes to all 700 WDC employers. Over 170 people attended one of nine training seminars held around Wisconsin, and 118 people obtained this information via one of twelve Webinars.
- Great-West also met individually with several of the WDC's larger employers, including the Department of Administration - Central Payroll, the State Legislature, the University of Wisconsin System, Dane County and the City of Green Bay.

### **Office Location**

Great-West opened its new local WDC office on November 1, 2005, at 5325 Wall Street, Suite 2755, Madison, WI 53718. This office is on the far east side of Madison, near Interstate Highways 39, 90 and 94 and High Crossing Boulevard. The suite includes a conference room for meetings, is easily reached from the interstate highway system and local Madison bus routes, and meets handicap accessibility requirements.

### **Staffing**

Great-West will have a total of ten staff based in Wisconsin dedicated to the WDC. The Great-West local WDC office will be led by Sue Oelke, who was recruited from NRS, the prior administrator. Department staff is confident that Ms. Oelke's knowledge and experience with

the WDC will help smooth the transition to Great-West. The primary WDC call center will be in Glendale, Wisconsin, with backup provided by the Great-West call center in Colorado.

### **Contacting the WDC**

Great-West has established the following avenues for participants to reach the WDC:

- Toll-free telephone: 877-457-WDCP (9327). Press “1” to access the automated voice response system or “2” to speak with a local representative.
- Web site: [www.wdc457.org](http://www.wdc457.org). While this is the same WDC Web address as before, the site will have a new look and additional features, such as financial calculators and tools like “dream tracker,” “rebalancer,” dollar cost averaging and allocation modeling.

### **Transition Timeline**

#### November 16, 2005

- Last day for allocation and deferral changes for future contributions with NRS.

#### November 25, 2005

- Last day for any fund transfers or account changes with NRS.

#### November 25 to approximately December 12: Quiet Period

- Between November 26, 2005, and approximately December 12, 2005, no transactions could be made, including investment option transfers, new withdrawals and hardship withdrawals. Existing periodic payments and payroll deferrals (contributions) continued as scheduled.

#### November 28, 2005

- First day that Great-West began receiving and recording WDC payroll deferrals.

#### November 30, 2005

- Last day that NRS recorded WDC activity.

#### December 1, 2005

- All WDC assets transferred to Great-West, which began recordkeeping for the WDC.

#### December 7, 2005

- WDC participants were mailed a letter with their new Personal Identification Number (PIN) and the current investment allocations for their payroll deferrals. These allocations will be based on the final allocation information received from NRS.

#### December 12, 2005

- All existing account balances will be verified and reconciled. The WDC will re-open for all account activities, including reviewing investment allocations, making changes, obtaining account balances and transferring between funds.
- The WDC Web site and toll-free telephone system (KeyTalk) will be fully operational so participants can personalize PIN and Usernames.

#### Mid-January 2006

- First quarterly WDC participant account statements provided by Great-West, reflecting activity for the month of December 2005.