



New York Secure Choice Savings Program Board Meeting

October 7th, 2025



**Secure Choice
Savings Program**



Agenda

New York Secure Choice Pilot Program

Program Administration Update

Program Enhancements

Next Steps

New York State Secure Choice Savings Program Pilot

21 registered employers

20 employers currently submitting payroll contributions to New York Secure Choice

242 employees now saving for retirement in the program

Robust industry representation and a range of employee population reflected

Positive feedback from employers regarding the ease of facilitation

Program Administration Update

Employer communications

- Employer notice series ready to be sent to eligible employers

Employee communications

- Employee notices sent to employees added by employers

Program website

- Employers and savers have access to portals in order to manage their accounts
- Resources
 - Employer and Saver Fact Sheets, Registration checklist
 - Help Center
 - Contact information available

Eligible employer population ready to receive notifications

Program Enhancements

Webinars

- Payroll webinars with interactive Q&A being held twice per month for employers
- Invitations are sent to registered employers with upcoming payroll dates
- Dedicated page for payroll webinar registration

Payroll Integrations

- Vestwell integrated with over fifty payroll providers
- Dedicated Help Center articles and instructional videos

Vestwell Service Center

- Service Center staffed and trained to support employer and saver calls
- Email servicing active
- Live Chat available for employers who have been authenticated in the employer portal

Program Enhancements (continued)

Customer Identification Process (CIP)

- Enhanced identification process by using additional data points (such as phone number or email address) and new data sources
- Streamlined resolution process by simplifying the document submission process

App for Savers

- Savers can manage their accounts similar to the online portal experience

Next steps

Program Open communications ready to be sent to eligible employers

Webinars

Monitor employer and saver activity

Support marketing and outreach efforts



Thank You

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