

# Retirement Member Content Guidelines



Guidelines for super fund marcomms and customer experience teams in the use of retirement related content for members.

**TAL**



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# Introduction

## Supporting your member engagement

It makes sense for super funds to support conversations with members which increase financial, physical and mental health literacy and wellbeing, no matter where they are in life.

One of the ways our partnership can enable this is through targeted retirement content that engages and educates, nudging members to take control of their health and finances and take action where needed.

## TAL Retirement insights

To deepen our understanding of the realities of retiring, TAL commissioned a research study into the lived experience of Australian retirees, as well as the concerns and expectations of those approaching retirement. The insights this has provided has helped inform the educational member content we develop.

## How can you use it?

Throughout the year, there are numerous opportunities to engage with members on their retirement goals – both during public campaigns, annual events and at key life milestones which provide a natural segue into these conversations. The following pages provide guidance on opportunities for engagement with financial health and retirement topics.



# Talking to members about life after work

Whether they're preparing for or already living in retirement, Australians welcome guidance from their super fund on how best to manage their retirement savings.

One of the most positive insights from TAL research is that financial engagement is high among both pre-retirees and retirees. Almost three in four pre-retirees (74%) said they were 'engaged' or 'very engaged' in managing their financial health. For retirees, financial engagement was even higher at 79%.

## What can we do?

This presents a clear opportunity for super funds to capitalise on their members' engagement by providing education and guidance to help members make decisions that will improve their retirement outcomes.

Together, we have an important role to play in ensuring members engage with all areas of their health so they can live life to the fullest – not only while they're working, but into retirement as well. We can do that by providing content to support your members education and help nudge them to consider their personal circumstances.

TAL's Retirement Lived Experience research study was an online quantitative survey of 442 pre-retirees and 558 retirees aged 55 or older, conducted in August 2023 by TAL research partner edentify

# 74%

Are engaged with managing their financial health.

# 34%

Don't know what to do with their super when they retire.

# 51%

Are looking to their super fund for guidance.

# Opportunities for engagement

These dates are focused on a member cohort of 50+ years. Some are recognised dates throughout the year, together with personal milestones like birthdays.



# Let's get started

The retirement suite of content is designed for a mix-and-match approach. There's a range of topics, so there'll be something to suit everyone. Use as much, or as little as you'd like and choose the timing that suits your member communications plan.

## Retirement content assets

To kick things off, we have a selection of content including articles and the accompanying eDM/social suggested copy for you to use. You'll find the assets available for download on the [Group HQ Member Content](#) page. Content will be added and refreshed over time.

Content	Description
eDM/social copy	Suggested customisable copy for member eDMs and/or social posts
Member blog	Financial health in retirement
Member blog	Physical health in retirement
Member blog	Mental health in retirement

# Questions?

If you have any questions, please get in touch with your TAL partnerships manager.

## Feedback

We'd love to know what you think of our health content and your thoughts on any other types of content you'd like to see. Drop us a line at [groupcommunications@tal.com.au](mailto:groupcommunications@tal.com.au) with feedback.

