



Strategic Plan

2026–2028



CLOSE THE SAVINGS GAP

- Provide industry-leading, accessible solutions to continue to bridge the household savings gap, allowing Virginians to achieve key life financial goals
- Develop and strengthen alliances with strategic partners including employers, community leaders, and financial advisors to increase participation in programs (education, disability and retirement)
- Execute strategy to advocate for policy and legislative changes to alleviate gaps
- Eliminate barriers to financial attainment by developing innovative solutions and tools for all communities



FOSTER A LIFETIME OF FINANCIAL WELLBEING

- Provide free access to quality financial education resources and tools for all Virginians
- Establish and strengthen partnerships with governmental, non-profit, and academic institutions to advance missions
- Promote a culture of saving among underserved populations through tailored outreach and messaging strategies
- Support initiatives to transform lives through access, affordability, and attainment of all forms of education



SERVE AS A TRUSTED FINANCIAL PARTNER

- Deliver thoughtful and innovative solutions to enhance and improve customer and employee experience through business operations, governance, and investment management
- Ensure personal identity, information security protection, and safeguard of customer assets through effective risk management
- Protect and fulfill fiduciary and statutory responsibilities to the Agency, participants, and the Commonwealth
- Utilize business intelligence, dashboards, and benchmarking to provide better services and solutions