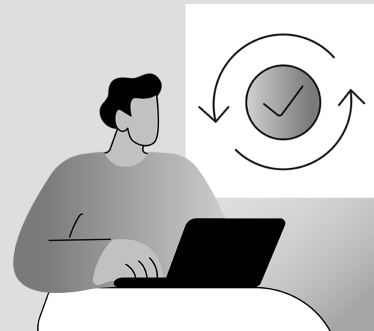




Continuity and Enhancements Ahead for Your Participants



As your transition approaches, you can rely on us to keep your participants informed about their retirement plan experience.

In the coming week, we'll begin communicating with participants using the content previewed below* to share:

- news of the transition and what they can expect when their plan moves
- future enhancements, including the **READYSAVE™** mobile retirement app
- a link to their [participant transition webpage](#) featuring important dates and frequently

asked questions (FAQs)

As additional communication, here is [a flyer](#) you can post to your intranet and share with your participants.



If applicable to any of your participants, their communication will include an update regarding a slight change in managed account fee timing and methodology.

See the [participant communication preview](#) for full details.*

Important deadlines for plan sponsors

Before your move to the Ascensus recordkeeping platform in November, there will be a "blackout period"—a limited time during which certain account activity will be restricted. Make note of these important deadlines below:

Participant requests and payroll submissions

November 11, 2024

- Last day for participants to request an online distribution or loan

November 12, 2024

- Last day for plan sponsors to approve online distribution or loan requests
- Last day to submit and fund a payroll for a payroll date on or before November 12, 2024. If funding via ACH pull, files must be received by 1:30 p.m. ET. Payrolls with a payroll date after November 12, 2024, should not be entered until after the transition is complete the week of November 18.

Participant notices: October 1, 2024

The Department of Labor (DOL) requires that plan participants be given at least 30 days advance notice before any blackout period. As some functionality will be temporarily turned off beginning November 11, 2024, we will distribute [this blackout notice](#) to your participants for you no later than October 11, 2024. Note: Hard copy blackout notices will be personalized with your plan name prior to mailing.

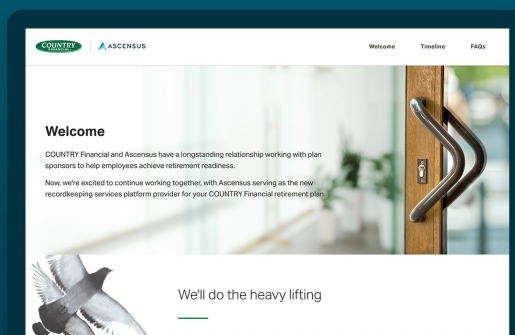
We expect the blackout period to end, and trading activity to resume, during the week of November 18, 2024. If we have an email address on file, you and your participants will receive an email when your plan's move is complete and account access is restored. Participants can also visit their employee website to log in beginning the week of November 18.

The full list of participant deadlines can be found on the [FAQ page of your transition website](#) and will also be posted to the [participant transition webpage](#).

Stay informed every step of the way.

Visit your transition website for all the info you need about your upcoming move.

[Go to your site](#)



See the full timeline.



Get answers to frequently asked questions.



View the latest updates and resources.

As always, we're here to answer any questions you may have.

**This email will be sent to all participants for whom we have email addresses on file. The email preview included in this communication is a sample of what your participants will see. Content that is not applicable to them will not be shown.*

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