

## Welcome.

Your First Citizens Wealth<sup>™</sup> retirement plan account has successfully moved to a new recordkeeping platform.

## Easily access your account online

Go to the employee website: <u>secure.ascensus.com/login/</u> <u>firstcitizenswealth/participant</u>. Log in with the same username and password. Consider bookmarking the URL for easy access in the future. Escanee el código QR para leer este mensaje en español.



### Get the most out of your plan-review and update these key plan features

To make the most of your experience, take a few minutes to review the checklist items below and update your account information as needed.



#### **Investment elections**

If you did not select your investment(s), you will see the **Enroll Now** link or button allowing you to actively select your investments for new contributions or leave as is. <u>How to Enroll</u>



## Beneficiary information

Additional beneficiary details are required to ensure your retirement proceeds go to the intended recipient(s). Designate Your Beneficiary



#### Savings rate

If you previously had a fractional percentage or dollar amount for your savings rate, you'll now see a whole percentage or dollar amount displayed. Please confirm or update your election as needed. <u>Online Contribution Change</u>

### Automatic savings rate increases

You may need to re-establish your annual auto-deferral increase. Auto Increase



#### Automatic account rebalancing

If you had auto-rebalancing turned on before the move, you will need to re-establish your auto-rebalance elections. <u>Automated Account Rebalancing</u>

#### Download the READYSAVE™app for secure, one-touch access to your account.

After you log in to the employee website for the first time, you can access your account from the READY**SAVE** mobile retirement app with the same username and password.

### Now that your plan has moved, it's a great time to:

Save for a better future—your way. Get personalized insights, monitor your progress, and take action on the <u>employee</u> <u>website</u> and mobile app. Project potential monthly retirement income based on your current savings strategy with My Forecast and Personal Performance. Everything you need to manage your account is in one place.

# Wherever you are in your retirement journey, you can gain insights along the way that will help you build confidence as you save for your future.

First Citizens Wealth<sup>™</sup> products and services are offered by: First-Citizens Bank & Trust Company, Member FDIC; First Citizens Investor Services, Inc., Member FINRA/SIPC, an SEC-registered broker/dealer and investment adviser, and a licensed insurance agency; First Citizens Asset Management, Inc. and SVB Wealth LLC, SEC-registered investment advisers.