

SEP IRA AND SIMPLE IRA PLAN SPONSOR REFERENCE SHEET

Easily Access Your Plan and Employee Websites

Plan website

www.sponsorinsight.com **NEW!**

1. Register using the activation link sent to you via email.
2. Establish your unique username and password.

Employee website

myaccount.ascensus.com **NEW!**

1. Register by clicking **Get Started**.
2. Establish your unique username and password.

Use the plan website to:

- submit contributions
- review plan balance
- access plan reports and documents

Use the employee website to:

- check your account balance
- designate your beneficiary
- set your electronic delivery (eDelivery) preferences

Trust/custodial information

Where do I send plan deposits and related instructions/forms?

ACH pull funding (also known as ACH debit)

To avoid a delay in ACH debits, notify your financial institution of the change in ACH debit originator, and provide them with Ascensus Trust's ACH Company ID: **4450404698**.

ACH push funding

Wells Fargo Bank, NA
San Francisco, CA
ABA# 091300010
Credit to Ascensus Trust, Fargo, ND
Account #2705962062
Reference your plan ID and plan name

Wire instructions

Wells Fargo Bank, NA
San Francisco, CA
ABA# 121000248
Credit to Ascensus Trust, Fargo, ND
Account #2705962062
Reference your plan ID and plan name

Check instructions

- Make payable to Ascensus Trust
- Include plan ID and plan name in memo line
- Send a copy of applicable supporting documentation with the check to ensure timely processing

Mailing address

Ascensus Trust
P.O. Box 10068
Fargo, ND 58106-0068

Overnight address

Ascensus Trust
1655 43rd Street South, Suite 100
Fargo, ND 58103
Phone: 701-552-9068

Contact information

Client Services

For plan-related day-to-day inquiries and questions

Phone: 833-889-4554
Monday through Friday
9:00 a.m. to 7:00 p.m. ET

Participant Services

For account-related day-to-day inquiries and questions

Phone: 833-889-9878
Monday through Friday
9:00 a.m. to 7:00 p.m. ET