

New migration resources and information for your 403(b) plan

We recently shared the exciting news that your Vanguard 403(b) Services plan is migrating from Newport to the Ascensus recordkeeping and administrative services platform in mid-November.

Get the latest migration updates and resources all in one place on your **migration website**:

- **More information about Ascensus**—your plan’s new recordkeeping and administrative services provider
- **Frequently asked questions**—including what you and your employees can expect with your plan’s upgrade to the Ascensus platform
- **Migration timeline**—with key dates and milestones
- **Dedicated participant section**—which will be shared with participants directly
- **Copies of migration communications**—so you can easily see what’s been sent to you, as well as your participants

For easy reference, we suggest bookmarking the site, which will be regularly updated as we get closer to November.

Important dates related to migration.

Ahead of your plan’s move, there will be a limited time, or “blackout period”, during which account access will be restricted for you and your participants. **There is nothing you need to do**, but please note these dates, which we have shared with participants directly:

- Distributions and loan processing (if applicable) will be suspended for participants at market close (generally 4:00 p.m. ET) on Tuesday, November 7, 2023.
- Distribution and loan approval (if applicable) must be received no later than market close (generally 4:00 p.m. ET) on Wednesday, November 8, 2023.
- All transaction activity and account updates will be suspended beginning at market close (generally 4:00 p.m. ET) on Thursday, November 9, 2023. At this time, participants will be able to view their 403(b) account balance on vanguard.com, but details about their account will be unavailable until the blackout period is over.

Easily find what you need on your migration website.

Go to <https://nu5-transition.retsupport.com> or scan the QR code below.



- We anticipate that during the week of November 13, 2023, the blackout period will end, and trading activity and account updates will resume.

Let us know the best way to reach you.

Please work with your client services team to confirm or update your email address. This will help ensure you receive the latest migration updates and other plan-related information in a timely manner.

There's a lot to look forward to.

Soon, you'll begin to see the benefits of Ascensus and Newport forming a unified organization. These include more streamlined plan administration and new pathways to saving for your participants as your experience evolves over time.

The Vanguard 403(b) client services team is here to answer any questions you may have. Please contact your client service manager or call 877-893-5426 Monday through Friday from 8:00 a.m. to 8:00 p.m. ET.

Thank you for the opportunity to serve your plan.