

Over the last few weeks, we've been communicating to your Advisor and with you to take the necessary steps to migrate your Prime Plan Solutions retirement plan over to Aspire's recordkeeping platform, InvestLink<sup>SM</sup>. As you are aware, **we require all plans to sign new service agreements no later than December 2, 2016 to begin the migration process on December 28, 2016**. We are approximately 40 days from the goal date to migrate your plan to the InvestLink platform, which has recently been enhanced with a new look, improved navigation, and additional features that provide a positive customer experience. Please review the details and information provided below regarding migration dates, essential changes to prepare for, and training information. We are committed to providing dedicated service support to ensure a smooth migration with minimal disruption.

You can look forward to these features and functionalities with your new Plan Sponsor portal:

- Mobile-friendly capabilities providing easier and more dynamic account access and management
- Automatic email notifications for contributions
- Easy-to-use online Distribution & Loan wizard—with ability to view available balances for each type of distribution and online approvals (when applicable)
- Online fund exchange request
- Broad database of investment options
- Transactions validated with email confirmations
- A full library of educational tools and materials customized by Participant life stages

### Migration Details and Dates You Need to Know

1. The migration will begin at 4:00 p.m. ET on Wednesday, December 28, 2016 and end Tuesday, January 10, 2017.
2. During this time there will be a Blackout Period, which means:
  - You are unable to process contributions
  - Participants are unable to:
    - Direct or diversify investments
    - Obtain a distribution/loan
    - View their account online
3. Participants will NOT be out of the market at any time.

### Communicating with Sponsors and Participants

You will be communicating directly to your Participants to inform them about the InvestLink migration. The first communication is the **Participant Notice of Blackout Period**, which Participants must receive by **November 28, 2016**. In addition, we developed a **Participant InvestLink overview letter** for your use to provide the highlights of the migration. You have the option of sending the communications by email or as a direct-mail letter.

For participants receiving installment distribution payments, a revised schedule of dates will be communicated separately.

### Contributions, Distributions and Loans

To familiarize you with the new processes for these administrative tasks, please review the

**You have Questions – We have Answers**

Please refer to the **Frequently Asked Questions (FAQs)** compiled for your convenience.

**Learning about InvestLink**

Access to training resources and additional information is available through multiple channels on our **Prime Plan Solutions (PPS) Resource Center**, including videos, webinars, user guides, brochures and frequently asked questions. Starting with the **InvestLink Video** will provide you with an overview of the platform features and benefits.

We thank you for your patience and understanding during this transition. If you have any questions, please send your inquiries to **PPS@aspireonline.com** or call Aspire's customer service team at 866.634.5873 and select Option 5 for Prime Plan Solutions business.



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