

Subject line: InvestLink Migration Progress Report

We are pleased to have you as a valued client of the Aspire family. Thank you for your patience while working through the introductory period of the prime plan solutions conversion to Aspire's InvestLink platform that went live on February 13.

Together, we executed the implementation of this large-scale migration with manageable disruption. Within the six-month timeframe, we managed the following milestones with a team of Aspire and partner-dedicated resources to support the PPS business onboarding:

- Converted approximately 2,100 plans
- Migrated approximately 30,000 total participants with 18,000 active
- Sent 25 communications to each stakeholder
- Shifted 850 plans from commission to fee-based models
- 200+ plans shifted compensation model from commission to level-compensation
- Processed 2,100 new contracts through online data and contracting tool
- Received 7,820 hits on the PPS landing page

We did have a few hiccups. Our biggest challenge has been responding to a high volume of calls and emails. Our Call Center experienced higher-than-normal call volume in the initial startup due to encountering issues with sponsor logins, which slowed down our response time. From February 13 to date, our call volume went from 207 to 103 calls per day. We also experienced a higher-than-normal volume in our dedicated email inbox.

We've added many Saturdays to our 'work week' to assist with managing through the large call volume and emails for service requests. Most recently, during an eight-hour period with a full team of associates, we were able to reduce our backlog of emails of varying types by a 46% reduction and voice mails by a 94% reduction.

For those of you who have experienced a longer wait time, we want to ensure you that our normal standard of service is a minimal average call wait time of 30 seconds and a response time of 24 hours to an email request. The sponsor login issue was quickly resolved. We are continuing to handle a higher number of calls than usual, as users become accustomed to the new InvestLink platform.

We have created a suite of tools to help you quickly get familiar with InvestLink. All of our resources are available in Aspire's [InvestDesignSM Center](#) (advisory business portal) on the InvestLink News page. If you haven't signed up yet, [register now](#). This landing page provides access to FAQs, brochures and training resources through multiple channels, including videos, demos, webinars and user guides.

We look forward to supporting your retirement business with the converted PPS plans and future opportunities. We value your business and are committed to providing you with superior customer service.

If you have any questions, please send your inquiries to PPS@aspireonline.com or call Aspire's Customer Service team at 866.634.5873, Option 5 for Prime Plan Solutions business.