

Over the last few weeks, we've been working together to migrate the Prime Plan Solutions retirement plans over to Aspire's recordkeeping platform, InvestLinkSM. 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 plans 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 Advisor portal:

- User-friendly mobile capabilities and easy-to-use navigation tools
- Broad database of investment options and performance reports
- Simple-to-use model view and management
- Plan account balance detail reports by fund and source
- Participant detail reports including access to statements
- Distribution & Loan wizard
- Participant transaction email confirmations
- A full library of educational tools and materials customized by Participant life stages
- Dedicated support from our customer service team with extended Call Center hours Monday – Friday, 8:00 a.m. – 8:00 p.m. ET

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:
 - Sponsors 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

The formal migration communication plan communicates to all stakeholders to ensure all parties are familiar with the platform and the migration. You are receiving this notification one day prior to Plan Sponsors, who are receiving their *InvestLink Operations* email on Thursday, November 17. Within the Plan Sponsor communication is a link to a communication that Plan Sponsors will send to Participants between November 17 and November 28 informing them about the migration.

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.



Copyright © Aspire Financial Service, LLC. All rights reserved.

Aspire—Delivering Smart Retirement Solutions

Aspire Financial Services, LLC is a leading service provider of smart retirement solutions, serving the industry since 2002 with a conflict-free, open-investment retirement planning management system for all plans. Aspire provides a best-in-class technology-enabled portfolio of pre-defined or highly customizable smart retirement solutions with private-label branding options through its proprietary technology platform and strategic partnerships. To learn more, visit www.aspireonline.com or call 866.634.5873.

4010 W. Boy Scout Blvd. Suite 450, Tampa FL 33607 | [Unsubscribe from our emails](#)