

You will experience a new account portal soon

We're pleased to inform you that we are preparing for the migration of your Prime Plan Solutions (PPS) business to Aspire's **InvestLinkSM** retirement recordkeeping platform. **Your plans are scheduled to start migrating on December 28, 2016. There will be a Blackout Period from December 28, 2016 through January 9, 2017.** We are committed to implementing your InvestLink migration with minimal disruption and will be communicating with you regularly through email to keep you informed throughout the transition. It is important to note, **signed Service Agreements are required no later than December 2, 2016 to ensure your plan will not be terminated on December 31, 2016.**

Your New Recordkeeping Platform

InvestLink is Aspire's open-investment, DOL-compliant, configurable recordkeeping platform that links the retirement planning community with investment options for all plan types and offers a cost-effective, transparent pricing structure.

InvestLink delivers features and functionalities that are new to your plan management, designed to provide a rewarding experience for all plan levels:

- Easy-to-use navigation tools
- User-friendly mobile capabilities
- Educational tools and materials customized by life stage
- Extended Call Center hours Monday – Friday, 8:00 a.m. – 8:00 p.m. ET

InvestLink also delivers specific benefits to each of the plan levels:

Advisors/TPAs

- Plan Account Balance Detail Reports by fund and source
- Participant Detail Reports including access to statements
- Investment Performance Reports
- Dedicated Business Relationship Consultant support

Sponsors

- Auto email notifications on contributions
- Online distribution and loan approvals (when applicable)
- Online fund exchange request
- Easy-to-access document library

Participants

- Easy password set up
- Online access to previous statements and real-time information
- Online Distribution & Loan wizard with online approval
- Access to online fee disclosure

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

on Monday, January 9, 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

To ensure there is minimal disruption during your migration, we have developed a formal migration communications plan. This is the first in the series of communications about the InvestLink migration you will receive between now and January 10, 2017, the Go Live! date.

You will receive notifications and communications to distribute to Participants at specified milestone dates. The first Participant notification will arrive on November 17, which should be distributed by November 28 to ensure your Participants are aware of the migration dates and details.

Key Dates

October 18 - December 2, 2016 – Plan Sponsors complete and return new Service Agreement package to ensure no interruption in service

November 9, 2016 – Advance notice of Fund Reassignment and Blackout Period

November 17, 2016 – Plan Sponsor notification of InvestLink operations information including communication to share with Participants

November 17 - 28, 2016 – Plan Sponsors communicate to Participants

November 28, 2016 – 30-day notification of Blackout Period and C class share changes

December 28, 2016 – Migration begins

December 28, 2016 - January 9, 2017 – Blackout Period

December 31, 2016 – Current Service Agreement terminated

January 1, 2017 – New Aspire Service Agreement effective

January 10, 2017 – Go Live!

Please visit the [Prime Plan Solutions \(PPS\) Resource Center](#) for additional information.

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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