

To prepare you for a seamless transition to Aspire, we have developed training webinars to familiarize you with the Plan Sponsor User Portal including the contribution submission process options for your plan. We recommend that you register for one of the training sessions as soon as possible so that you are fully prepared to hit the ground running to service your plan and Participants once the migration is complete.

NEW! Choosing a Contribution Submission Option

All contributions submitted on or after **February 13, 2017**, will have two contribution submission options to choose from:

- **File Import** – commonly used for plans with 25 or more Participants
- **Direct Client Entry** – commonly used for plans with 25 or less Participants

Both of these options can be used for plans of any size. We have created the **How to Guide: Submitting Contributions, Distributions and Loans** providing more details to help you decide the best option for your plan. If you choose to upload a file, there is a brief course available on the InvestLinkSM Upload File page that walks you through all of the steps.

Training Webinars

For your convenience, we have scheduled weekly **training sessions** on Thursdays at 2:00 p.m. ET, which provide a live walk-through on navigation of the sponsor site, including functions such as the File Import and the Direct Client Entry contribution submission options.

You have Questions – We have Answers

Please visit the **Prime Plan Solutions (PPS) Resource Center** for additional information about the migration and the InvestLink platform, including video demos for Plan Sponsors and Participants. We have also prepared Frequently Asked Questions (FAQs) for Plan Sponsors.

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, Option 5 for Prime Plan Solutions business. We look forward to working with you.

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.