

October 26, 2020

Dear Valued Clients and Partners,

As we announced in January 2019, Means & Associates and ERISA Compliance Associates became part of Ascensus. You may have already heard about our new name, and now we're pleased to share some exciting news: effective November 9, 2020 we'll officially become FuturePlan by Ascensus. Rest assured you'll receive the same dedicated expertise and outstanding client service you've come to expect from us, delivered by the same expert team. The only difference will be our new national brand. You'll soon see the FuturePlan name in all your interactions with us, replacing the Means & Associates and ERISA Compliance Associates name.

FuturePlan is a specialized line of business within Ascensus, combining high-touch personalized TPA services with the unmatched strength and security of a leading national firm. As part of FuturePlan, we'll be able to provide an even wider range of specialized services, technology, security and expertise to all our valued partners. You'll see the following changes starting in November:

- **Logo:** Our correspondence, reports, and websites will display the FuturePlan logo:



- **Email addresses:** Starting November 9, 2020, you'll see our email addresses change to the @futureplan.com domain. All phone numbers remain the same.
- **Secure Email Enhancement:** We're upgrading to a secure email system which will allow more of our messages to reach your email box. The new system reduces the amount of secured messages by 95%, providing easier message access for you. You'll be prompted to set up credentials the first time you access the upgraded secure email system.
- **Invoices** will show our new logo starting in December 2020. This change will coincide with an update to our billing and payment system. We'll share more information with you soon in a separate email communication.
- **Website:** On or close to November 2, 2020, our websites will change to a transitional FuturePlan page. This page will include our contact information and a message confirming clients and participants should continue to access their login portals as usual. Information for The Tribal Group is available on a [FuturePlan.com webpage](https://www.futureplan.com), dedicated to services for Tribal Plans.

We will send you updates about any additional changes, however please be assured your assigned service team members and the level of service and responsiveness you've come to expect from us will remain the same. In the meantime, please feel free to reach out to your dedicated consultant directly or call our office with any questions. We also encourage you to visit [FuturePlan.com](https://www.futureplan.com) to learn more.

We greatly appreciate your loyalty and partnership and look forward to continuing to assist you, your clients, and plan participants.

Sincerely,

The Means & Associates and ERISA Compliance Associates Team