



March 24, 2021

Dear Valued Partner,

You may have already heard about our new name, and now we're pleased to share that it's official: effective March 31, 2021, we'll become FuturePlan by Ascensus, delivering the same dedicated expertise and outstanding client service under a new national brand. You'll soon see the FuturePlan name in all your interactions with us, replacing the Goldleaf Partners name.

FuturePlan is a specialized line of business of Ascensus, combining high-touch personal TPA service with the unmatched strength and security of a leading national firm. As part of the nation's largest network of expert TPAs, we'll be able to provide an even wider range of specialized services, technology, security and expertise to you and your clients.

Here are some of the upcoming changes and activities happening this year:

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



- **Email addresses:** As of March 31, 2021, you'll see our email addresses change to the @futureplan.com domain. All phone numbers remain the same.
- **Invoices:** In May our invoices will show the FuturePlan logo. This is part of our conversion to an enhanced billing system. You'll receive a separate communication with additional details.
- **Distributions contact email:** distributions@goldleafpartners.com will change to mndistributions@futureplan.com.
- **Contributions contact email:** contributionsq@goldleafpartners.com will change to mncontributions@futureplan.com.
- **Secure Email Enhancement:** Reminder--we upgraded to a secure email system several months ago. It allows more of our messages to reach your email box. The new system reduces the number of secured messages by 95%, providing easier message access for you. If you haven't used it yet, you'll be prompted to set up credentials the first time you access the upgraded secure email system.
- **Website:** On March 31, 2021, our website will change from goldleafpartners.com to a transition webpage branded FuturePlan and providing our contact information and a link to resources and login portals.
- **Cycle 3 Restatements:** Clients requiring a Cycle 3 restatement will receive further communication from us in the spring.

We will send you updates about any additional changes, however, please be assured that your assigned service team members and the level of service and responsiveness you've come to expect

goldleafpartners.com

Phone: (866) 882-8442

from us will remain the same or better. In the meantime, please feel free to reach out to me directly with any questions and visit futureplan.com to learn more about FuturePlan by Ascensus.

We greatly appreciate your loyalty and partnership and look forward to continuing to support your success.

Sincerely,

Goldleaf Partners