



May 27, 2020

Dear Valued Clients and Partners,

We're pleased to share some exciting news: Starting June 1, 2020, we'll officially become **FuturePlan by Ascensus**, delivering the same dedicated expertise and outstanding client service under a new national brand.

As you may have already heard, FuturePlan is a specialized line of business within Ascensus, combining high-touch local 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 services, technology, security, and expertise to all our valued clients and partners.

During the transition, you may continue to see our legacy name on our website, documents, and email domains, among other things. You can rest assured that we're working hard to complete the rebranding in a thoughtful way to help ensure that there is no disruption to the services we provide. Thank you in advance for your patience as we move through the process.

Here are some of the changes you'll see:

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



- **Email addresses:** Starting June 1, 2020 and the following two weeks, you'll see our email addresses change to the [@futureplan.com](mailto:@futureplan.com) domain. All phone numbers will remain the same. Be sure to add [@futureplan.com](mailto:@futureplan.com) to your approved sender list to ensure you're receiving our communications.

- **Secure Email Enhancement:** We're upgrading to a secure email system that 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:** Our invoices will be updated to show our new logo.

**PLEASE NOTE:** A new payment portal is launching in July 2020. You'll receive a separate email soon with details on submitting ACH payments and a new address for sending payments through the U.S. Postal Service.

- **Websites:** A transitional web page with a link to the Employer Portal and essential contact information will launch on June 1, 2020 to replace our current website.

Please continue to use the [Employer Portal](#) for your retirement plan and to conduct business with us as usual. Your Employer Portal will be rebranded this summer in conjunction with the launch of a completely redesigned experience that will provide seamless and intuitive navigation along with greatly enhanced functionality and security.

We'll send you updates about additional changes as needed; however, please be assured that your assigned service team members and the level of service you've come to expect from us will remain the same. Feel free to reach out to your plan consultant with questions or contact me directly. Visit [FuturePlan.com](#) to learn more about FuturePlan.

Sincerely,

John Townsend, Vice President  
FuturePlan | Service