



part of FuturePlan by Ascensus®

April 29, 2021

To Our Valued Clients and Partners,

On behalf of the whole QBI team, we're pleased to share the news that we're taking the next step in becoming part of the FuturePlan family, with a name change effective **May 5, 2021**. We became part of FuturePlan by Ascensus three years ago, focused on expanding the range of services we provide to our clients and partners. Since 2018, we've been working in partnership with our national organization, and now is an ideal time to move ahead with our new name and brand, unifying the QBI team with the power of a national leader.

You'll still experience the same dedicated team delivering the same great service you've come to know, enhanced by the power of a major national firm that shares our values of quality and integrity. Your day-to-day contacts will remain the same.

Here are some of the changes you'll see:

- **Logo:** Starting on May 5, our correspondence, reports, and websites will display the FuturePlan logo:



- **Email addresses:** On May 5, you'll see our email addresses change to the @futureplan.com domain. All phone numbers remain the same. Our QBI email addresses will forward to the new ones in case you forget.
- **Secure Email Enhancement:** We're pleased to offer you an upgraded email system with easier, yet highly secure, message access. Provided by Mimecast, our new system reduces the number of messages requiring login by 95%. The first time you access it, you'll see a screen with the FuturePlan logo and a prompt to set up login credentials.
- **Website:** Our QBIllc.com website will forward to a transition FuturePlan web page with contact information, portal links, and other helpful resources.

We'll send you updates about any additional changes, and please be assured that your service team members and the level of responsiveness you've come to expect from us will remain the same. In the meantime, please reach out to your QBI consultant or sales partner directly with any questions. You can visit our new home at Futureplan.com to learn more, and connect with us on [LinkedIn](#).

Thank you for being a valued part of the QBI family for so many years, and welcome to the FuturePlan family! We greatly appreciate our relationship with you. We look forward to a successful future together, helping you reach your retirement goals.

Sincerely,

The QBI / FuturePlan Team

P.S. If you want to stay connected with us and be the first to hear about new webinars, regulatory insights from our expert FuturePlan ERISA team, advisor education opportunities, and other retirement plan topics, please [sign up here for FuturePlan Connect](#) and [FuturePlan Benefits Advantage](#), and follow FuturePlan on [LinkedIn](#) and [Twitter](#).