

April 22, 2021

To Our Valued Clients and Partners,

On behalf of my whole Kravitz team, I'm pleased to share the exciting news that we're taking the next step in becoming part of the FuturePlan family, with a name change effective April 28, 2021. As most of you know, we became part of FuturePlan by Ascensus back in 2017, focused on expanding the range of services we provide to our clients and partners. After four years of rewarding partnership with our national organization, we decided that now is an ideal time to move ahead with full rebranding and a name change, unifying our incredible team with the power of a national leader.

In other exciting news, the Kravitz team now anchors FuturePlan's National Center of Excellence for Cash Balance Plans, under my leadership. This change, implemented more than a year ago, has strengthened Cash Balance services across the nation for all of FuturePlan. In turn, our team is enjoying the benefits of greater investment in technology, security, and innovation.

We're still 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 April 28, our correspondence, reports, and websites will display the FuturePlan logo:



- Email addresses: On April 28, you'll see our email addresses change to the @futureplan.com domain. All phone numbers remain the same. Our Kravitz email addresses will forward to the new ones in case you forget.
- Invoices will show our new logo starting next month. Our new payable name for checks is Ascensus c/o FuturePlan. Please continue sending payments to our PO Box using the updated company name: FuturePlan, c/o Ascensus, P.O. Box 102062, Pasadena, CA 91189-2062. No changes for ACH/credit card payments.
- Secure Email Enhancement: We're enhancing our secure email system to one that allows more of our messages to reach your inbox, reducing secured messages by 95% for easier access. You'll be prompted to set up credentials the first time you access the upgraded email system.

- Loan and Distribution Team contact email: loansandwithdrawals@kravitzinc.com will change to CBCOEloansandwithdrawals@futureplan.com
- Website: Our website KravitzInc.com will forward to a transition FuturePlan website with contact information, portal links, and other helpful resources. Our CashBalanceDesign.com website remains the same, rebranded for FuturePlan.
- Retirement Center Portal: Our secure portal for exchanging confidential documentation will change from portal.kravitzinc.com to portal.cashbalancedesign.com. Functionality and login remain the same.

We'll 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 from us will remain the same. In the meantime, please feel free to reach out to me directly with any questions and visit Futureplan.com to learn more.

Thank you for being a valued part of the Kravitz family, and welcome to the FuturePlan family! We greatly appreciate our relationship with you and look forward to continued success together, helping you reach your retirement goals.

Sincerely,

Dan Kravitz, on behalf of the Kravitz/FuturePlan team

PS: If you want to stay connected with us and be first to hear about webinars, regulatory insights, and important retirement plan topics, please sign up for [FuturePlan Connect](#) and follow FuturePlan on [LinkedIn](#).