

May 4, 2021

To Our Valued Clients and Partners,

On behalf of the whole Pension Strategies 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 **May 12, 2021**. As most of you know, we became part of [FuturePlan by Ascensus](#) back in 2019, focused on expanding the range of services we provide to our clients and partners. After two 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.

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 starting on **May 12, 2021**:

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



- **Email addresses:** Our Pension Strategies email addresses will change to the [@futureplan.com](#) domain. All phone numbers remain the same. Our Pension Strategies email addresses will forward to the new ones in case you forget.
- **Website:** Our [pensionstrategies.com](#) site will forward to a transition FuturePlan page with contact information, links to the [Client Portal](#), and other resources.
- **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.
- **Invoices:** Invoices will show our new logo starting in June 2021 as part of an enhanced online billing and payment system. You'll soon receive a separate email communication with additional information.

We'll send you updates about any additional changes, however, please be assured that your assigned 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 dedicated plan consultant or to me directly with any questions. You can also learn more by visiting [Futureplan.com](#) and [FuturePlan on LinkedIn](#).

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

Sincerely,

***Julie M. Thompson, QPA, QKA, on behalf of the Pension Strategies/FuturePlan Team***  
**Operations Director**

**[JThompson@PensionStrategies.com](mailto:JThompson@PensionStrategies.com)**

**Phone (602) 957-7101 Direct (602) 386-5946**

**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](#).