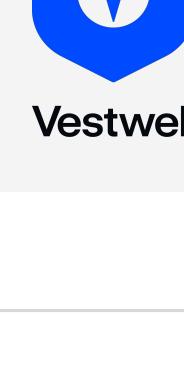


# The transition of your Accrue 401k plan to Vestwell is starting soon.

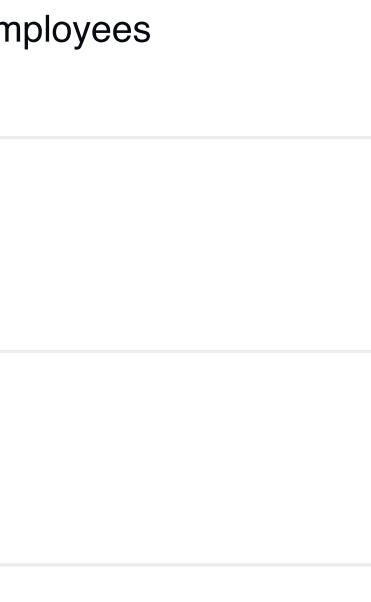
We're here to support you and your employees every step of the way.



New

## Start here: Your Vestwell Welcome Kit

We've created a comprehensive Welcome Kit to help you stay informed and prepared throughout the transition. It outlines:



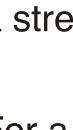
Who Vestwell is and how we support you and your employees



What to expect at each stage of the transition



Key milestones, timing, and responsibilities



Resources to help you communicate with your employees

[Access my Welcome Kit](#)

## What to expect during the transition.

Plans will transition to Vestwell's platform in cohorts to support payroll continuity, data accuracy, and service stability. **Your group's transition dates will be communicated to you in the coming weeks, and you can expect a two-week plan transition period between March 4 and May 6.**

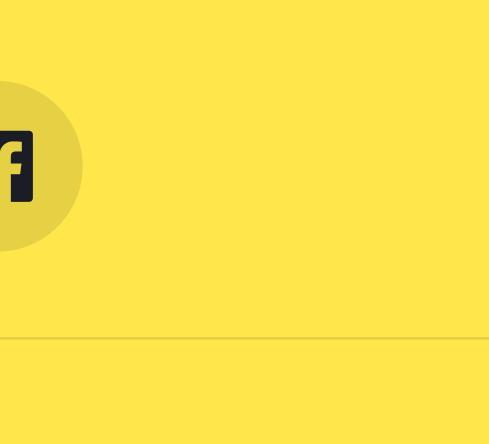
Ahead of your plan's transfer, we recommend completing any remaining 2025 compliance tasks in the Accrue 401k portal. Taking care of these items in advance helps support a smooth transition.

Once onboarding begins, you'll create your account, confirm your company data, set your preferences for certain plan features, and reconnect your payroll integration if applicable to your plan. The transition process was designed to be simple, combining a streamlined digital experience with personalized support when you need it.

For a centralized view of key updates, timelines, and resources, visit the Transition Hub.

[Visit the Transition Hub](#)

[Sign up](#)



Copyright © 2025 Vestwell Holdings Inc.

Vestwell.com is owned and operated by Vestwell Holdings Inc. and its subsidiaries ("Vestwell"). Located in New York, NY. Investment-related content is provided for general information purposes by Vestwell Advisors, LLC, an SEC-Registered Investment Adviser, and is not intended to be construed as investment advice. Investments involve risk and are not guaranteed.

Vestwell and our logo are registered trademarks of Vestwell Holdings Inc. All investments have risk. None of the content provided on our app, website, or the output of any tools we provide

should be interpreted or relied upon as investment advice or a recommendation or endorsement of any investment or strategy. Investors should carefully review the materials and disclosures provided to them and engage their own qualified financial professional before making any investment decisions.

