

An update about your retirement plan.



Your workplace retirement plan is moving to Vestwell, the modern savings platform helping more people save for what matters most. We’re committed to making this transition as smooth and straightforward as possible.

Plans will transition to Vestwell’s platform in cohorts (groups) to support payroll continuity, data accuracy, and service stability.

Your transition group	Your transition window
{{Cohort Name}}	{{Transition Start Date}} – {{Transition End Date}}



Blackout Period

To ensure your plan transfers properly and as quickly as possible, there will be a brief period of time, called a “blackout period,” when employees won’t be able to log in or make changes to their retirement plan accounts. Vestwell will notify employees directly and share the specific blackout dates in a separate [blackout notice](#).

- **Your blackout start date:** {{Blackout Start Date}}
- **Your expected blackout end date:** {{Blackout End Date}}

Once the transition is complete, employees will receive an email inviting them to set up their Vestwell account.

Here’s the short overview of what to expect during the transition process:

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Your plan will move to the Vestwell platform, where Vestwell will serve as your plan’s recordkeeper and custodian.
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Participant assets will remain invested throughout the transition in the funds selected prior to the blackout period.
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Once the blackout period ends, participants will have full access to their accounts and new tools and options for managing their savings, including goal based investing and [emergency savings](#).

Plan sponsor fee disclosure

As part of this transition, Vestwell provides a detailed [Plan Sponsor Fee Disclosure](#), outlining the services provided to your plan and the associated fees.

To prepare for your transition, we recommend reviewing the Pre-Transition Checklist. Once you receive your registration email, you’ll be guided through the next steps to complete the registration process.

If you have questions or would like to learn more, visit Vestwell’s [Transition Hub](#) or contact our team at clientsuccess@vestwell.com.



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