

From: [Cetera Retire Client Notifications](#)
To: [EMailProofs](#)
Subject: Important payroll contribution deadline
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Important payroll contribution deadlines and billing information

Payrolls submitted on or after Oct. 14 at 1 p.m. ET on your current Avantax Retirement Plan Services (RPS) platform will not be processed.

Please note that payrolls that were submitted on or after Oct. 14 at 1 p.m. ET will not be processed. These payrolls must be submitted again on the new Cetera Retire platform once the plan move is complete. We'll let you know the week of Oct. 19 when you can start submitting payrolls on the new platform.

After your plan migrates, you'll have three ways to submit payroll contributions:

- **Payroll integration (180 or 360):** Where data is passed from your payroll vendor to the recordkeeping platform. If you are currently integrated with a payroll vendor, that integration will remain in place after conversion and no changes will be required. After conversion, if you would like to explore adding or changing a payroll integration, you can review our list of approved [integrated payroll vendors](#) to learn more about your options.
- **Online file upload:** Use a formatted file to upload the data. View the Ascensus formatted [payroll template and instructions](#).
- **Online submission:** Use this to manually enter the data.

Please note: After your plan has moved to the new Cetera Retire

platform, you will have the ability to opt into having forfeiture and suspense funds automatically applied against incoming employer contributions.

Additional key dates and billing updates

- **Oct. 14 by 1 p.m. ET:** Last day for participants to request a distribution, make an investment or deferral change, and request a transaction, including exchanges.
- **Oct. 14–ending the week of Oct. 19:** Your plan will enter a blackout period until the move is completed within the week of Oct. 19.
- **Quarter 3 billing cycle:** Q3 invoices are expected to be delivered later than usual, in late Nov., as billing administration transitions to Ascensus. Ascensus will provide more details in late Oct. about invoice timing, delivery methods, payment options, and available support.

Important upcoming Avantax website accessibility dates

As we prepare to move recordkeeping platforms from the current Avantax RPS platform to the new Cetera Retire platform, make note of the important dates when functionality will be turned off on your current website.

- **Oct. 14 by 1 p.m. ET:** Participants will no longer have access to request:
 - a distribution
 - an investment election or deferral rate change
 - a transaction, including exchanges
- **Oct. 14 by 1 p.m. ET:** You will no longer have access to submit payroll files.
- **Oct. 15 by 2 p.m. ET:** You will no longer have access to the Avantax RPS website.
- **Week of Oct. 19:** You will receive an email once your plan has moved to the Cetera Retire platform with your new website URL and instructions.

Visit your [migration website](#) for more information about the transition, key dates, and resources, including a walkthrough video of a payroll submission.

Please contact your relationship manager if you have questions.

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