From: Cetera Retire Client Notifications
To: EMailProofs
Subject: PS: Your plan migration will begin Oct. 17
Date: Wednesday, October 7, 2026 10:59:00 AM

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Check out the latest resources to prepare for the migration

Use these resources and tools for a smooth transition

This weekend, your retirement plan will migrate to the new Cetera Retire recordkeeping platform, and we're excited to welcome you. To ensure a smooth transition, we've created several resources and recommendations below.

1. **View and print your Plan reference sheet**
   Your Plan reference sheet includes your plan and employee website addresses, wire and check deposit instructions, and updated service contact information. View it here.

2. **Review the Resources page of your migration website**
   Your Resources page includes new tools you can share with participants, including a participant checklist and helpful information about the READY**SAVE**® mobile app.

3. **Remind your employees about the upcoming migration**
   Here are two resources to help you send reminders about the migration:

   - Print and distribute the "Mark Your Calendar Flyer"
   - Email employees using this pre-drafted message

We look forward to serving your plan and helping your employees save for a better future.

Please contact your relationship manager with any questions.

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