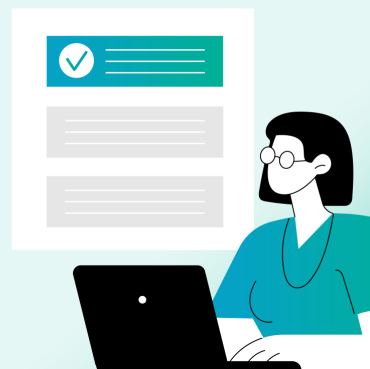


From:
To:
Subject: You have updated plan documents and notices for review
Date:

[View this email as a web page](#)



Take Action to Prepare for a Smooth Migration



Vista 401(k) Plan

This April, your retirement plan will be moved to the Ascensus recordkeeping platform. Please review the important information below related to your plan's move and take action as needed. Don't forget, [your migration website](#) is your 'always on' source for more resources and information.

What's next?

Service agreement update

A migration package with amended service agreement language will be posted to your plan website in the coming weeks. This is a non-signature package; please save it for your records.

Participant investment/deferral election notification

On the Ascensus platform, only investment and deferral elections in whole percentages or dollar amounts will be accepted.

If our records show you have participants with fractional investment or deferral elections (i.e. participants whose elections are not whole percentages or dollar amounts), we have provided a list of those [participants as of January 22, 2025](#).

Participants can visit their employee website to update their fractional elections to whole percentages or dollar amounts prior to your plan's move. If no action is taken, elections will be automatically adjusted with the migration.

In late March, we will email participants with fractional investments or deferrals at that time (for whom we have an email address on file) to inform them of these changes and action they can take. For more details, review this [fractional investment update](#) and [fractional deferral update](#).

Important: Please share the applicable message with participants who do not have an email address on file. Unless you contact us prior to migration, you are directing us to adjust fractional deferral and/or investment elections as described in the linked updates above.

As always, we're here for any questions you may have.

Please note, if you are the plan sponsor of multiple plan types across the heritage Newport organization, you may receive communications related to certain plan types at different times. Our goal is to get the right information to you at the right time depending on the plan. If you have questions about a particular plan, please contact your plan's service representative.



Everyone deserves to feel financially secure.

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www.ascensus.com

For plan sponsor use only.

Please do not reply directly to this message, as the email box is not monitored. If you wish to contact us, use the information provided in the above communication or link.

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