

From: [Cetera Retire Client Notifications](#)
To: [EMailProofs](#)
Subject: Your October Cetera Retire Plan Enhancement Update
Date: Tuesday, July 7, 2026 5:12:13 PM

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Looking Forward to Your October Migration



Update regarding your service agreement and Fidelity Transfer of Assets packages

As part of your Avantax Retirement Plan Services (RPS) plan now becoming Cetera Retire and upgrading to the Ascensus recordkeeping technology on Oct. 19, we're making sure you and your employees receive timely information and updates.

Action Required

We are updating your plan documents and service agreements, additionally we are happy to share fees have not increased.

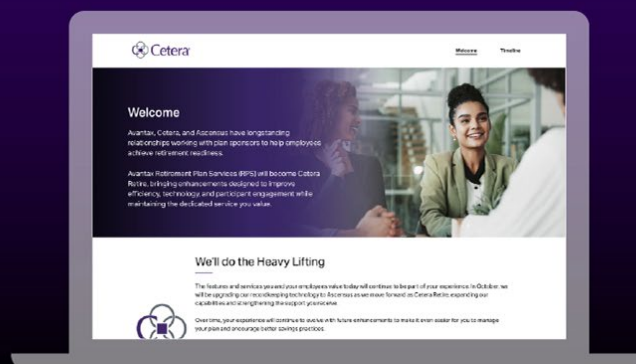
- **Plan Documents and Service Agreements update** — Within the next few weeks, the plan's authorized signers will receive an email that contains a link to a package that will include your plan document and service agreements for electronic signature via Sertifi.

- Sender email: document.event@ascensus.com
 - Subject line: **Action Needed: Plan Document Package Requires Your Signature as Adopting Employer**
 - Follow all instructions provided in that email to ensure timely signing of the documents.
 - Your new six-digit client ID will be your password to access your package.
 - The link to the Sertifi package will expire after 5 days. Please complete your signature within the 5 days.
- **Reminder: Fidelity Transfer of Assets update** — To prevent disruption of services, please ensure you have signed the Fidelity Transfer of Assets.

Stay informed every step of the way.

Visit your website for all the information you need about your upcoming plan enhancement.

[Go to your site](#)



See the full timeline.



Get answers to frequently asked questions.



View the latest updates and resources.

Please contact your Relationship Manager with any questions.

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