

**From:**  
**To:** [EMailProofs](#)  
**Subject:** Ascensus migration next steps: Sharing the news with participants  
**Date:**

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## Continuity with enhancements ahead for your participants



### Vista 401(k) Plan

As your retirement plan migration approaches, you can rely on us to keep your participants informed about their retirement plan experience.

**In the coming week, we'll send an email to participants to share:**

- news of the migration, an introduction to Ascensus, and what they can expect when their plan moves
- future enhancements, including an award-winning financial wellness program and the READY**SAVE**™ mobile app
- a link to their [participant migration webpage](#) featuring important dates and FAQs

Share [this flyer](#) with migration details with your participants as needed or post it to your intranet.



See the [participant communication preview](#) for full details.\*

### **Important deadlines for plan sponsors**

Before your move to the Ascensus recordkeeping platform in April, there will be a limited time, known as a "blackout period," during which certain account activity will be restricted. Make note of the important deadlines below:

### **Participant requests and payroll submissions**

#### **April 21, 2025**

- Last day for participants to request an online distribution or loan

#### **April 22, 2025**

- Last day for plan sponsors to approve online distribution or loan requests
- Last day to submit and fund a payroll for a payroll date on or before April 22, 2025. If funding via ACH pull, files must be received by 1:30 p.m. ET. Payrolls with a payroll date after April 22, 2025, should not be entered until after the migration is complete the week of April 28.

### **Participant notices: March 21, 2025**

The Department of Labor (DOL) requires plan participants to be notified of any blackout period at least 30 days in advance. As some functionality will be temporarily turned off beginning April 21, 2025, [this blackout notice](#) must be provided no later than March 21, 2025. If you've enrolled in electronic delivery (eDelivery), we will distribute this notice to your participants for you—digitally to participants with email addresses on file and hard copy to those without.

### **Action required**

Since your plan does not currently use our eDelivery service, please provide a copy of the blackout notice to all plan participants by March 21, 2025. As a courtesy, we'll email the notice to participants with email addresses on file and send a hard copy to participants with no email address on file.

We expect the blackout period to end, and trading activity to resume, during the week of April 28, 2025. You and your participants will be

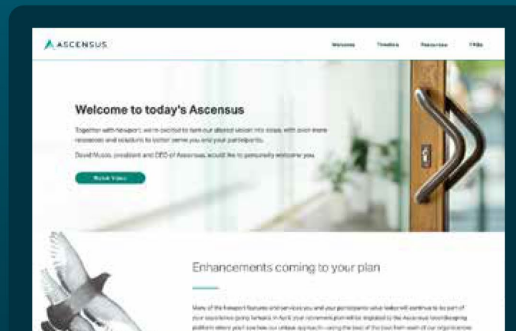
notified when access is available.

The full list of deadlines can be found on the [FAQ page of your migration website](#) and will also be posted to the [participant migration webpage](#).

## Stay informed every step of the way.

Visit your migration website for all the info you need about your upcoming move.

Go to your site



See the full timeline.



Get answers to frequently asked questions.



View the latest updates and resources.

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

\*This email will be sent to all participants for whom we have email addresses on file. The email preview included in this communication is a sample of what your participants will see. Content that is not applicable to them will not be shown.

*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.*



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### **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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