

RPS CUSTODIAL AND RECORDKEEPING TRANSITION PLAN SPONSOR CHECKLIST

Please use this document as a simple checklist of your “must-dos” as a plan sponsor prior to your transition.

- BLACKOUT NOTICE:** On August 3, 2021, Johnson Financial Group (JFG) distributed a **Blackout Notice** to all plan participants via email or USPS with notification of the MM Fund Change to: Fidelity Government Money Market Fund. **The blackout period will be September 2, 2021 to September 13, 2021.**
- NEW SIGNED DOCUMENTS:** Please look for a separate communication containing document(s) for signature.
- ADDRESS WHITE LISTING:** Check with your IT partners to ensure that the following websites and email addresses have been whitelisted for all users:

DOMAIN: worksaveretire.com

PUBLIC URL

trading.worksaveretire.com

ux.worksaveretire.com

up.worksaveretire.com

advisorportal.worksaveretire.com

advice.worksaveretire.com

advisor.worksaveretire.com

sftp.worksaveretire.com

PUBLIC IP

208.40.131.18

208.40.131.19

208.40.131.20

208.40.131.21

208.40.131.22

208.40.131.23

208.40.131.23

SPECIFIC EMAIL ADDRESSES

enrollmentkits@worksaveretire.com

noreply@worksaveretire.com

- NEW USER ID/PASSWORD:** Create a new plan sponsor User ID and password by logging in to the new website. **Note:** You will receive a separate secure email that will include your login credentials.
- NEW BOOKMARK URL:** Save the new website URL to your shortcut menu.
- UPDATE DEBIT AUTHORIZATION:** Contact your commercial bank to authorize ongoing debits for contribution submissions coming from Mid-Atlantic, ACH Customer/Originator ID: 1273169253.
- CONTRIBUTION PROCESS:** Your contribution submission process will remain the same. Tutorials will be available.
- LOGO:** If you haven't already done so, please email a PNG version of your logo to your JFG Account Manager to use in co-branded materials. If you don't have one, a copy will be created from your JPEG version.

Please contact your Johnson Financial Group representative with any questions.