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** 8, **2021 to September 20, 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	PUBLIC IP
trading.worksaveretire.com	208.40.131.18
ux.worksaveretire.com	208.40.131.19
up.worksaveretire.com	208.40.131.20
advisorportal.worksaveretire.com	208.40.131.21
advice.worksaveretire.com	208.40.131.22
advisor.worksaveretire.com	208.40.131.23
sftp.worksaveretire.com	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.