**IMPORTANT NOTE:**

Your prior recordkeeper must be notified of your intent to terminate before Ascensus will be able to contact them on your behalf. When using this template to notify your prior recordkeeper, be sure to print on your company letterhead. Please be sure to list my contact information within this letter.

DATE

Contact Name (Prior Recordkeeper)

Prior Recordkeeper Name

Address

City, State Zip

Re: Plan Name

Plan Identification Number

Dear Contact Name (Prior RK)/ To Whom it May Concern:

I would like to inform you that Company Name will be merging our Plan Name */ Plan Identification Number* into the Named PEP at Ascensus. As a result, your services and our agreement with your organization will be terminated as of mm/dd/yyyy (Day before Recordkeeping effective date with Ascensus). We authorize Prior Recordkeeper Name to directly speak with our Installation Coordinator listed below and provide them with any information they request related to the above-mentioned retirement plan.

Installation Coordinator Name

Phone Number

Email Address

Ascensus will be contacting you to finalize the Plan’s liquidation date, provide you with transfer/wiring instructions, as well as the information they will require to transfer the plan. Because the plan will be merging into the Named PEP at conversion it is our expectation that Prior TPA will also complete the final 5500 for the year of the merger.

Please advise the Ascensus Installation Coordinator if you require further information to fulfill this request. If you have any questions, please contact me directly.

Sincerely,

Trustee

Trustee Phone Number