

January 7, 2021

Dear Valued Clients and Partners,

We're pleased to share some exciting news: effective January 13, 2021, we'll officially become FuturePlan by Ascensus, delivering the same dedicated expertise and outstanding client service under a new national brand. You'll soon see the FuturePlan name in all your interactions with us, replacing the Swerdlin & Company name.

FuturePlan is a specialized line of business of Ascensus, combining high-touch personal TPA service with the unmatched strength and security of a leading national firm. As part of the nation's largest network of expert TPAs, we'll be able to provide an even wider range of specialized services, technology, security, and expertise to all our valued partners.

Here are some of the changes you'll see:

- **Logo:** Our correspondence, reports, and websites will display the FuturePlan logo:



- **Email addresses:** As of January 13, 2021, you'll see our email addresses change to the @futureplan.com domain. All phone numbers remain the same.
- **Invoices:** Starting in January 2021, invoices will show our new name, FuturePlan by Ascensus. The process for remitting payments remains the same.
- **Website:** On January 13, 2021, our website will change from swerdlin.com to a transition webpage branded FuturePlan and providing our contact information and links to our login portals.

We will send you updates about any additional changes, however, please be assured that your assigned service team members and the level of service and responsiveness you've come to expect from us will remain the same or better. In the meantime, please feel free to reach out to me directly with any questions and visit futureplan.com to learn more about FuturePlan by Ascensus.

We greatly appreciate your loyalty and partnership and look forward to continuing to help you reach your retirement goals.

Sincerely,

Lee Swerdlin, Vice President

lswerdlin@swerdlin.com

(678) 775-5553