MidAmerica

Date

<First Last>
<Address>
<City, State Zip>

RE: MidAmerica and your [PLAN NAME] – Plan ID: [XXXXX]

Dear <First>,

After careful consideration, [Employer Name] has selected MidAmerica Administrative & Retirement Solutions (MidAmerica) to provide administrative services for your [3121 FICA Alternative/Special Pay Plan]. On [Date], all assets will transition from the current plan administrator, [Name]. This means that all outstanding transactions must be submitted to [Current Administrator Name] prior to [Date], to be processed prior to the transition.

Who is MidAmerica?

We are a third-party administrator specializing in the administration of health care and retirement benefits for public sector employers. [Employer Name] has entrusted us to administer your benefits, in part, because of our 25-year history serving public sector employees and an over 99% client retention rate. Our job is to process your transaction requests accurately and timely, answer any questions you have about your plan(s), and make sure that the funding for your plan(s) is held properly. Complete transition benefits include:

- **Customer Service —** MidAmerica consistently maintains a 99% client retention rate largely due to our excellent customer service and participant resources.
- **Guaranteed Interest Rate —** If your funds are invested in the fixed annuity option, you will receive a X% guaranteed rate of return on your retirement plan funds through 20XX.
- **More Control —** If you are actively employed, you will now be able to diversify your funds and choose which investments align best with your objectives.

Investment 101

Your funds are invested in a [fixed/variable] annuity with American United Life Insurance Company® (AUL), a OneAmerica® company. AUL is headquartered in Indianapolis, Indiana and has been in business for more than 135 years. With close to $29 billion of assets under management, AUL has an A+ rating with A.M. Best. You can learn more about your investment options by reviewing the fund mapping sheets included with this letter.

SAMPLE

Administration Office
2855 Interstate Drive, Suite 115
Lakeland, FL 33805

Corporate Headquarters
One Harbour Place
777 South Harbour Island Blvd, Suite 390
Tampa, FL 33602

P: (800) 430-7999
F: (863) 686-9727

www.myMidAmerica.com

MidAmerica

As previously administered by [Current Administrator Name], all funding is initially invested in the fixed interest account. MidAmerica offers a high quality fixed interest annuity option, with a minimum rate guarantee of X% through 20XX. All earnings in the account are tax-free.

Transition Timeline

Your plan blackout period will begin on [DATE] and run until [DATE]. The blackout period allows [Current Administrator Name] to finalize any existing transaction requests and pay out all outstanding distributions prior to the plan transition to MidAmerica.

Your transition to MidAmerica will occur on [DATE], when assets will be transferred from [Current Administrator Name] to MidAmerica. Upon receipt of the funds from [Current Administrator Name], we will invest those funds based on the investment mapping enclosed. The mapping will be based on your investment holdings as of the fund liquidation date, [DATE].

[DATE]

Cease sending docs to [previous provider]. Blackout period begins.

[DATE]

Assets transferred from [previous provider] to MidAmerica.

[DATE]

Blackout period ends. Plan transition is complete.

Any transaction requests received by [Current Administrator Name] after [DATE] will be forwarded to MidAmerica for processing. Upon exiting the blackout period, all forwarded transactions will be processed.

Education and Resources

At MidAmerica, we work to provide you with the best resources possible to ensure you understand your plan and how to take advantage of it. Upon completion of the transfer of assets from [Current Administrator Name], you will receive a detailed Welcome Kit that walks you through how your plan is designed, how to access your online resources, how to submit a distribution request, and whom to contact for help.

MidAmerica will host in-person education sessions to review your [3121 FICA Alternative/Special Pay Plan] and answer any questions you may have. You will be notified of dates and locations as these educational sessions are scheduled.

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It's our promise that we will dedicate the time and effort to make sure your benefits plan is administered properly, and that you have the resources you need to take full advantage of it. If you have any questions or concerns, please email us at accountservices@myMidAmerica.com or call us at [(800) 430-7999 for 3121/(855) 329-0097 for SP].

Sincerely,

Chris Fitzgerald, MBA
Vice President of Operations

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<Date>

<First Last>
<Address>
<City, State Zip>

RE: Retiree Meeting Scheduled for [PLAN NAME] – Plan ID: [XXXXX]

Dear <First>,

[Employer Name] is dedicated to ensuring you receive the benefits you deserve. After careful consideration, we have decided to offer a FICA Alternative program through MidAmerica Administrative & Retirement Solutions (MidAmerica). A FICA Alternative Plan is a type of retirement plan for seasonal, part-time, and temporary employees that replaces Social Security. Funds are invested to grow tax-free, which means increased account value over time.

To help you further understand the advantages of your new benefit, [Name], a MidAmerica representative, has arranged a group retiree meeting in partnership with the [Employer Name] business office. We encourage you to join us and learn more about FICA Alternative Plans, as well as the transition to MidAmerica.

Meeting Details
[Day, Date]
[Time] [a.m. / p.m.]
[Number, Street Name]
[City, State, Zip]

We are excited about offering a FICA Alternative Plan and the added benefit you will receive as a result. Thank you, and we look forward to seeing you there.

Sincerely,

[Employer Name]

NOTE: THIS LETTER SHOULD BE PLACED ON THE EMPLOYER'S LETTERHEAD.

SAMPLE

MidAmerica

<Date>

<First Last>
<Address>
<City, State Zip>

RE: Transition Complete for [PLAN NAME] – Plan ID: [XXXXX]

Dear <First>,

We are happy to confirm that your transition to MidAmerica Administrative & Retirement Solutions (MidAmerica) was completed on [DATE]. Your prior [plan name] program has been replaced with a Special Pay Plan, which is a type of retirement plan that is funded by your employer when you retire or separate from service using special forms of compensation such as your unused sick leave or unused vacation pay.

To help you further understand your plan, we have included a detailed Welcome Kit with this letter. Your kit will walk you through how your plan is designed, how to access your online resources, how to request a disbursement, and when to contact if you need help.

MidAmerica has dedicated more than 25 years to perfecting the administration and service of benefits solutions for public sector employees like you. We promise that no matter where you're at in life, we will continue to dedicate the time and effort to make sure your benefits plan is administered properly, and that you have the resources you need to take full advantage of it. If you have any questions or concerns, please email us at accountservices@myMidAmerica.com or call us at (855) 329-0[illegible].

We're happy you're here.

Sincerely,

Trenton Teesdale, CEBS
Senior Vice President of Business Development

SAMPLE

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