60 days before effective date

Introductory call with dedicated account manager

45 days before effective date

Sign plan documents and return to MidAmerica

30 days before effective date

Plan Implementation

System Implementation

14 days before effective date

MidAmerica receives preliminary data files from previous provider. Blackout period begins.

5 days before effective date

MidAmerica receives funding and final data files. Funds are traded and settled.

Blackout period ends. Plan transition is complete.

Schedule is based on a “go-live” date of January 1, 2021. All timeframes identified above are meant to be “x” number of days before the effective date of January 1.