

**From:** [Elisa.Pantaleo@cbservices.org](mailto:Elisa.Pantaleo@cbservices.org) <[Elisa.Pantaleo@cbservices.org](mailto:Elisa.Pantaleo@cbservices.org)>

**Sent:** Wednesday, July 19, 2023 3:45 PM

**Subject:** PLEASE READ: IMPORTANT UPDATE ON FIDELITY TRANSITION FOR THE CHRISTIAN BROTHERS RETIREMENT SAVINGS 403(b) PLAN

To: Administrators of Participating Locations in the Christian Brothers Retirement Saving 403(b) Plan:

### **Fidelity Update**

We are happy to announce we that we will be out of the quiet period as of Noon Eastern Time, Thursday, July 20th. At that time, employees can go to [www.netbenefits.com](http://www.netbenefits.com) to set-up their account access and log in to:

- check their account balance
- confirm their beneficiaries
- set-up banking information for loan repayment
- set mailing preferences for communications from Fidelity

Please note:

- If employees have or have had prior Fidelity access, their log in information will be the same. When they log in they will also see their Christian Brothers Retirement Savings Plan.
- If employees have outstanding loans, the account balance they will see is NET of the loan amount. Their total account balance is the sum of the account balance shown and the amount of the outstanding loan balance.
- Retired participants receiving installment payments will need to set up their banking information to continue electronic payment.

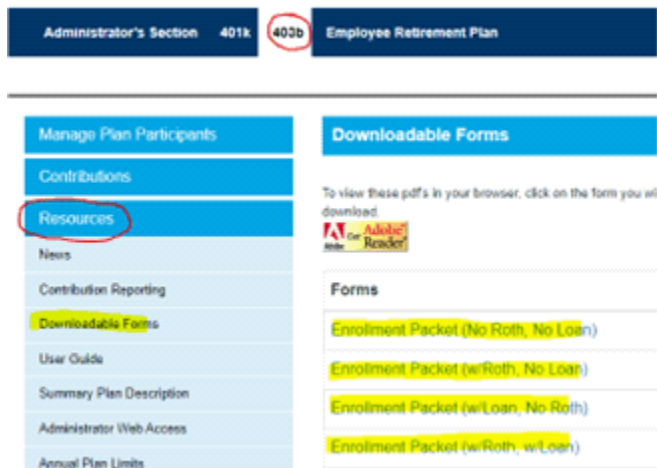
The transition website ([www.myfidelitysite.com/CBS403b](http://www.myfidelitysite.com/CBS403b)) will be updated tomorrow to communicate to employees that the quiet period is over. Postcards will also be mailed. Be sure to remind employees to register on the transition website for the upcoming *Get to Know Fidelity* webinars.

Date	Time
<u>Wednesday, July 26</u>	12 p.m. - 1 p.m. ET
<u>Tuesday August 1</u>	10 a.m. - 11 a.m. ET
<u>Thursday August 3</u>	2 p.m. - 3 p.m. ET

### **Enrollment Packets**

In addition, we wanted to let you know that we have updated our enrollment packets and they can be found in an **electronic format** on our administrator site. When logged in as an administrator, they are located under Resources

>Downloadable forms. Be sure to choose the packet applicable to your location:



You may download the pdf and save it on an internal company website or email it to new participants. This format also helps us to keep with our continual effort to go green.

If you prefer hard copies of enrollment packets, we are happy to get those made up for you as well. Just email [elisa.pantaleo@cbservices.org](mailto:elisa.pantaleo@cbservices.org) with your location number, how many enrollment packets you are requesting, and if you offer roth and/or loans.

If you do not currently have administrator access, and would like to be set up with access, please complete the attached administrator web access authorization form and also register online by clicking this link <https://cbsnet.cbservices.org/participants.nsf/profile?openForm>. (Please skip the section on health and wellness if your location does not offer health benefit services through Christian Brothers Services.)

If you need a special enrollment form, i.e. auto escalation/auto enrollment for your location, or if you have any questions, please contact me.

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