<Month Day, Year>

**IMPORTANT NOTE:**

Your prior recordkeeper must be notified of your intent to terminate before Bell Bank 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 include the contact of the Installation Coordinator within this letter.

<Contact Name (Prior Recordkeeper)>

<Prior Recordkeeper Name>

<Street Address>

<City, State Zip>

Via Email: <Email Address>

Re: <Plan Name>

<Plan Identification Number>

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

After careful consideration, <Plan Sponsor Name>. has decided to change service providers for the above-named plan (‘the plan”) effective <Month Day, Year>. Please accept this letter as formal notice to discontinue the services provided by your firm, and as authorization for our new service provider, Bell Bank, in partnership with Ascensus, to coordinate the transfer details.

<Installation Coordinator Name>

<Phone Number>

<Email Address>

You may accept this letter as authorization to work directly with **any** representative of Ascensus to provide data and assistance to facilitate this transition. Your key representatives’ information is above. We also authorize you to share any and all information with our new Retirement Plan Consultant at Bell Bank: <Bell Bank Retirement Plan Consultant Name> / < Bell Bank Retirement Plan Consultant Phone Number> / <Bell Bank Retirement Plan Consultant Email>.

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.

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