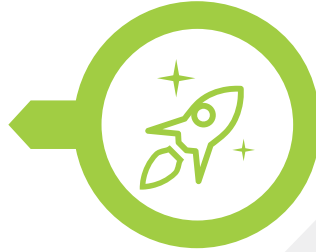


PEP Transition Timeline

New Opportunity
Advisor requests proposal
from Recordkeeper & Pentegra



Proposals Presented



Verbal Commitment



Pentegra Engagement &
Document Collection
Legal Review

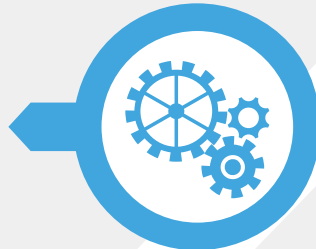


Pentegra Plan Document &
3(16) Education Call



60 - 90 day conversion
begins

Recordkeeper Onboarding



PLAN IS
LIVE

