GET READY FOR THE MOVE TO FIDELITY!

The **Wake Forest University Retirement Plans** are transitioning to Fidelity. Explore the timeline below to see what's happening, key milestones, and what you can expect along the way.



Monday, January 4, 2027, at 4:00 p.m. ET

The Quiet Period Begins

This is the last day to view your balance or make changes to your account:

- Request transactions (exchanges, loans, or distributions).
- Update investment elections.
- Change your contribution.

Tuesday, January 12, 2027

Asset Transfer

Your eligible account balances and beneficiaries are transferred to Fidelity.





Week of January 31, 2027

The Quiet Period Ends!

You now have full access to your account at Fidelity! You can now:

- Register on Fidelity NetBenefits by setting up your username and password to access your account. If you have an existing account with Fidelity, you can use that same login information to access your Wake Forest University 403(b) Retirement Plan account.
- View your Fidelity balance.
- Update your email and communication preferences.
- Enroll, change contributions, or update investments.
- Review or update beneficiaries.

Investing involves risk, including risk of loss.

The timing of the plan changes and transition period, including any asset reallocations, described within this presentation depends on a variety of factors, which may include the timing and accuracy of the transfer of data, receipt of instructions, and receipt of assets. Changes in any of these factors may result in changes to the timing of the delivery of services, the transition period, and/or the dates on which, and thus the prices at which, assets in your account are sold and/or reinvested.

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Fidelity Brokerage Services LLC, Member NYSE, SIPC, 900 Salem Street, Smithfield, RI 02917

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