

## **Communications**

With this newsletter, we are introducing a new method of communicating with our clients and associates. This is being delivered through a portal developed by Fort William, our document, compliance and forms provider.

One of the ways we'll use the portal is for delivering updates such as this - notices of operational changes, law changes, or just musings about the pension system. No login will be required and it should be just as easy as reading the message. We expect to do more, but shorter, updates.

The other way we'll use the portal is to exchange files. It's a secure system so we can safely upload and download files with sensitive information such as Social Security numbers. That will require a bit of extra work to set up a username, etc., but once established, it should be a nice easy interface, similar to other file sharing protocols but designed specifically for retirement plan administration. Tech-savvy clients can use it for a whole range of tasks, even to the point of entering census data online...but for others, we will continue to offer old-fashioned hard copy.

That's it for now - information on setting up an account will follow as applicable, and more newsletters as events dictate.