



MANAGING YOUR PLAN ONLINE WITH ALERUS

WEBINAR: ONLINE TOOLS AND FEATURES OVERVIEW

January 2026

ALERUS

AGENDA

- Welcome to Alerus
- Important dates and resources
- Plan sponsor website demonstration
 - Logging in
 - Key features
- Q&A

TRANSITION TIMELINE

KEY DATES

SPONSORS

- **Jan. 27** — Last day to submit contributions to Fulton via FFA401k.com (current site). Cut-off time: 1 p.m. ET.
- **Jan. 28** — Blackout begins 4 p.m. ET; account access unavailable through Feb. 3; current login page no longer available.
- **Jan. 28 – Feb. 3** — Plans transition to Alerus; hold contribution files until blackout ends. Submitted payroll files will be processed after blackout.
- **Feb. 4** — Plan access resumes at alerausrb.com; credentials and log-in details emailed by Alerus in two emails: 1) username/password reset instructions 2) account access info. Begin submitting contribution files to Alerus; payroll providers continue submitting as usual; payrolls held over blackout will be processed.
- **February** — January invoices sent by Fulton
- **April** — First quarterly invoice from Alerus (time period 2.1.26 – 3.31.26)

PARTICIPANTS

- **Jan. 26** — Installment payments scheduled for Jan. 28-Feb. 3 will be processed.
- **Jan. 27** — Last day to change contributions/investments and save documents before blackout.
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- **April** — First quarterly participant statements distributed by Alerus (time period 1.1.26 – 3.31.26)



WE'RE HERE TO HELP

PERSONAL SUPPORT

- **Fulton relationship manager** – primary contact
- **Alerus service team** – recordkeeping and administrative support
- **Alerus Client Service Center** - U.S.-based retirement specialists can assist with log in questions, enrollment and other retirement plan questions.
 - 8 a.m. – 8 p.m. ET, Monday - Friday
 - 800.433.1685
 - alerus@alerus.com

Please note: Wait times may be longer than usual immediately following the transition.

WE'RE HERE TO HELP

TRANSITION-SPECIFIC INFORMATION - SPONSORS AND PARTICIPANTS

A dedicated web page to support your transition with frequently asked questions, account access instructions and downloadable resources for participants and sponsors.

Visit: alerusb.com/planinfo

For Participants

☰ Frequently Asked Questions

- + Do I need to re-enroll in my retirement plan?
- + Is there anything I need to do before my account transitions to the new platform?
- + Will my login credentials change?
- + Will my current investment elections remain the same?
- + Will there be any disruption to my scheduled installment payments?

[View all FAQs](#)

For Plan Sponsors

☰ Frequently Asked Questions

- + Will I still work with the same people at Fulton Financial Advisors?
- + Who should I contact with questions or for additional support?
- + When will the recordkeeping transition happen?
- + Is there a blackout period when transactions cannot be processed?
- + How will I submit plan contributions?

[View all FAQs](#)

☰ Informational PDFs

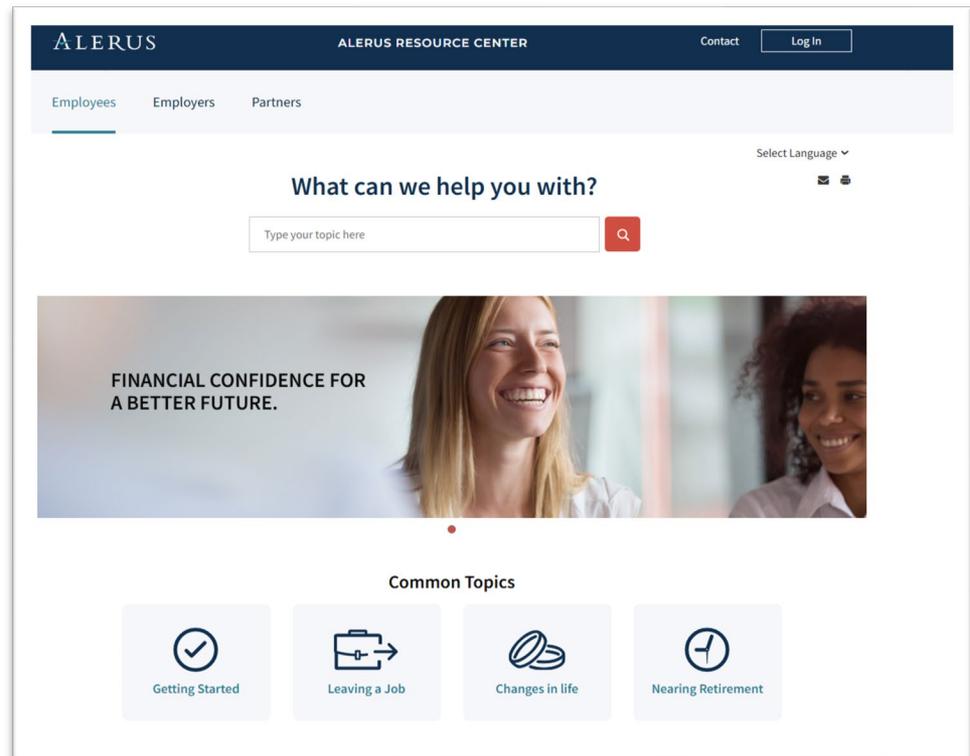
- 📄 [Employer Plan Access User Guide](#) (PDF)
- 📄 [Payroll Contribution Submission Guide](#) (PDF)
- 📄 [Blackout-Notice-sample](#) (PDF)
- 📄 [Blackout Notice participant email sample](#) (PDF)
- 📄 [Blackout notice participant letter sample](#) (PDF)
- 📄 [Participant fee disclosure sample](#) (PDF)

WE'RE HERE TO HELP

24/7 RESOURCES, GUIDES, TIPS

The Alerus Resource Center at alerusrb.com provides helpful resources for sponsors and participants to access and manage their plans. Available in English and Spanish.

Visit: alerusrb.com > Resources





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Please see last page for important disclosures.

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CONTRIBUTION FILES

HELPFUL HINTS

- Columns containing number should be formatted as numbers
- Columns containing dates must use slashes and be formatted MM/DD/YYYY
- Do not use any symbols in the file name
- Delete any “totals” rows at the bottom
- Don’t put any data or text below the last participant
- If you use any macros in the file, copy and pasted into a new file before uploading



THANK YOU!

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