

# 30-Day Re-enrollment Notice Template

The required technical 30-day notice to participants, giving them advance warning of the upcoming changes. Must be mailed unless the participant has agreed to electronic notices. Common practice is to send via both email and mail.

The information provided in this document is for educational and informational purposes only and should not be considered as legal, tax, nor investment advice. It is intended to serve as a sample for general reference only. You should consult a qualified attorney or legal professional for advice tailored to your specific circumstances. This material is a guide for institutional-facing purposes only and should be reviewed and tailored prior to distribution to other audiences, including use with participants.

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**Subject Line:** Notice of Qualified Default Investment Alternative (QDIA)

**Date:** [INSERT DATE]

**Body:**

Dear [Participant Name],

## Important Information

You are receiving this [initial/annual] notice to inform you of how your contributions under the plan(s) for [Institution Name] may be invested and how such contributions will continue to be invested if you have not made an investment election.

## How Your Contributions will be Invested

Your contributions will be invested in the Plan's default investment option, known as the Qualified Default Investment Alternative (QDIA). If you are participating in the retirement plan but did not make an election choice, you are automatically defaulted into the plan's default investment option(s). You will continue to be invested in the designated option(s) unless you provide complete investment instructions. Please disregard this notice if you have already provided or updated your investment instructions.

# What is the QDIA?

The QDIA for the Plan is [[Name of Default Investment Option](#)]. This option has been selected based on its potential to meet the retirement savings needs of participants who do not make their own investment choices. If you do not provide investment instructions, your contributions will automatically be invested in the QDIA.

You have the right to change your investment options at any time. You can transfer your contributions out of the QDIA to other available investment options within the plan.

Detailed information about the QDIA, including its investment objectives, risk and return characteristics, and fees, is available [[in the Plan's investment materials](#)]. You can request this information by contacting [[Plan Administrator's Contact Information](#)].

## How to Contact Us

If you have questions or would like to obtain updated information on expenses, a more detailed explanation of the default option(s), or more information about the other investment options available under the plan, please visit [[website](#)] or contact [[company name](#)] at [[phone number](#)]

We encourage you to review your investment choices carefully and consider your retirement goals. If you have any questions or need assistance, please contact [[Plan Administrator's Contact Information](#)].

Sincerely,

[[PLAN Recordkeeper or HR contact NAME](#)]

[[ADDRESS](#)]

[[TELEPHONE NUMBER](#)]

[[E-MAIL ADDRESS](#)]

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