



**ijoin** MAP  
MANAGED ACCOUNT PROGRAM

# Implementation Guide

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LDI-MAP LLC (d.b.a. iJoin) is a registered investment adviser with the State of Arizona - 16430 N. Scottsdale Road Suite 200, Scottsdale, AZ 85254 - (480) 300-4900.

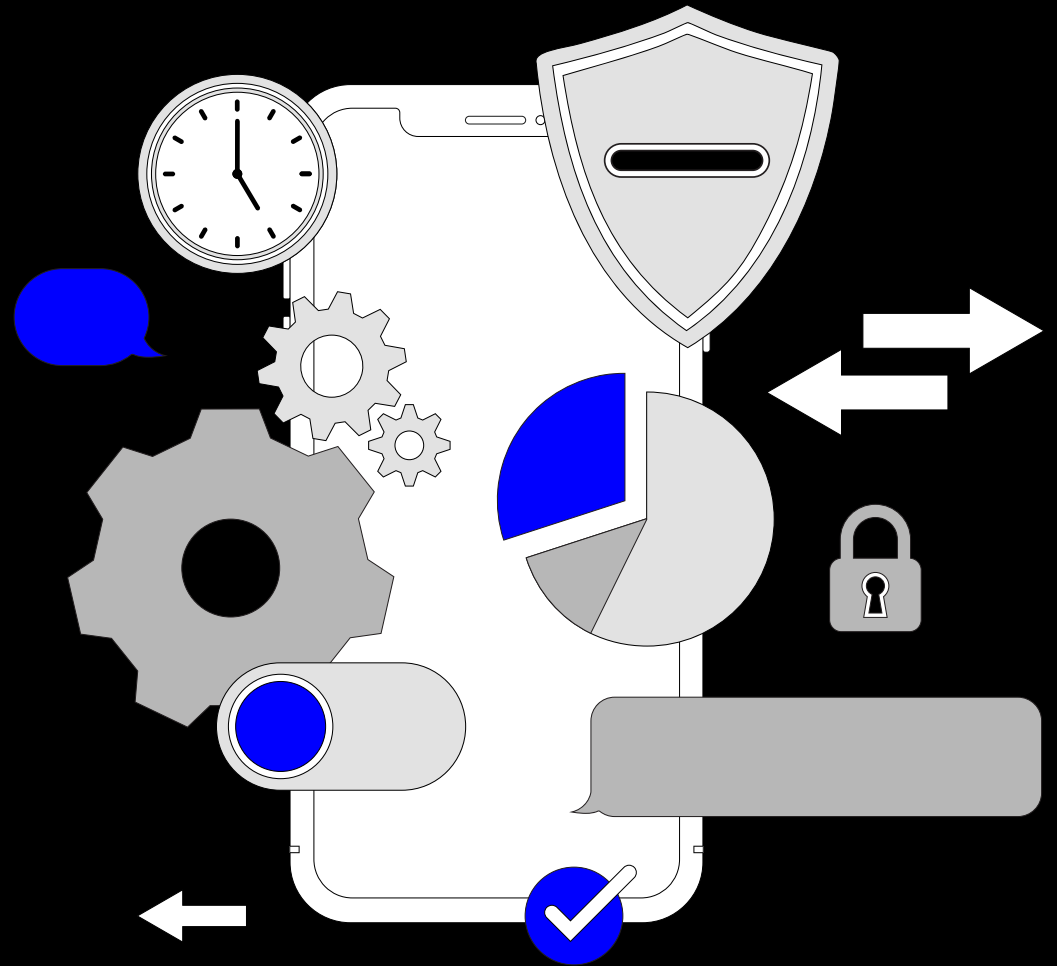
See our ADV Part 2A Brochure at [www.ijoinsuccess.com](http://www.ijoinsuccess.com)

# Welcome!

On behalf of the entire iJoin team, we want to thank you for selecting iJoin as your enrollment and Managed Account Program solution.

This Implementation Guide will provide you with the necessary steps and timeline to get started using iJoin. We've documented each step and provided everything you need to replicate the implementation process across your client base as desired.

Our goal is to make the process easy. If you have any questions, we're just a quick phone call away!



Contact iJoin Support

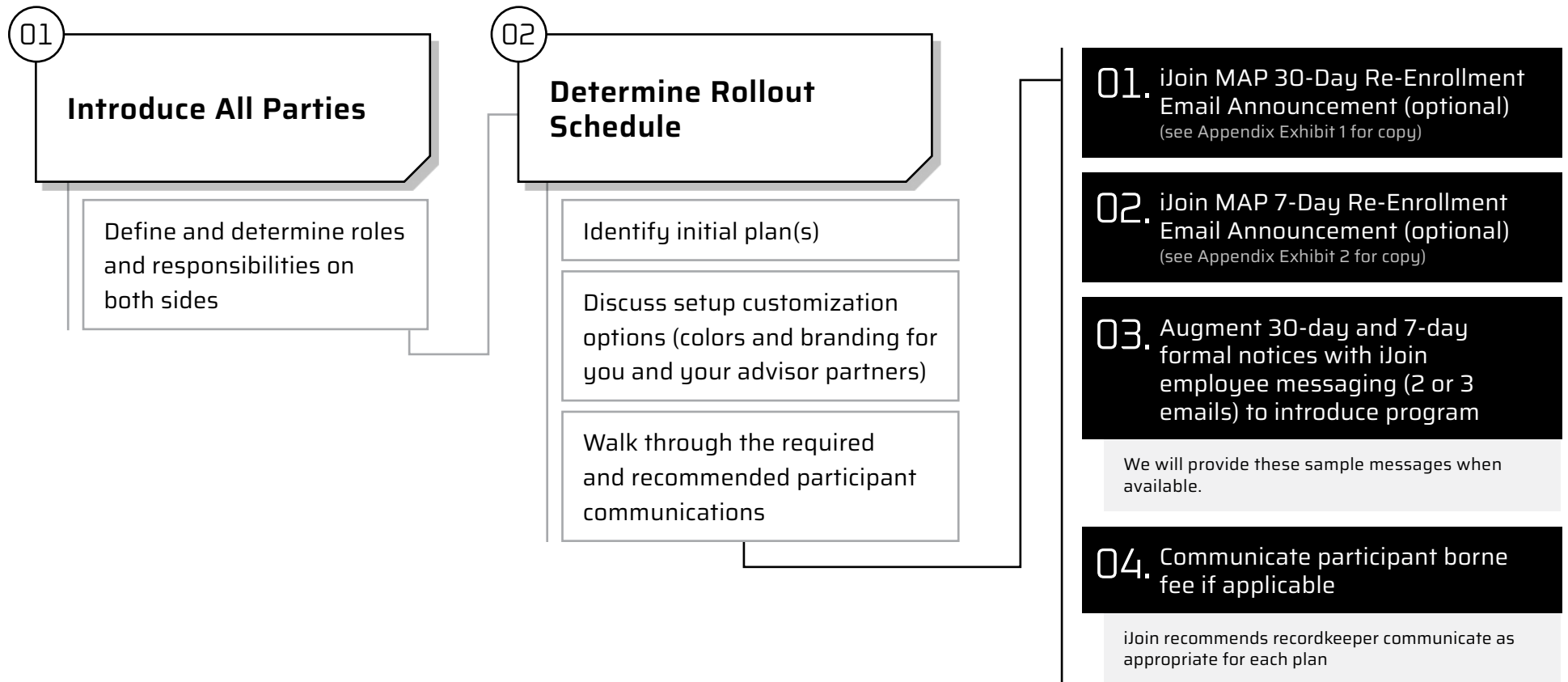
[iJoinSupport@iJoinSuccess.com](mailto:iJoinSupport@iJoinSuccess.com)

**Let's get started**

# Week 1 // Set-up

The first step in the implementation process is to schedule a partner kick-off call.

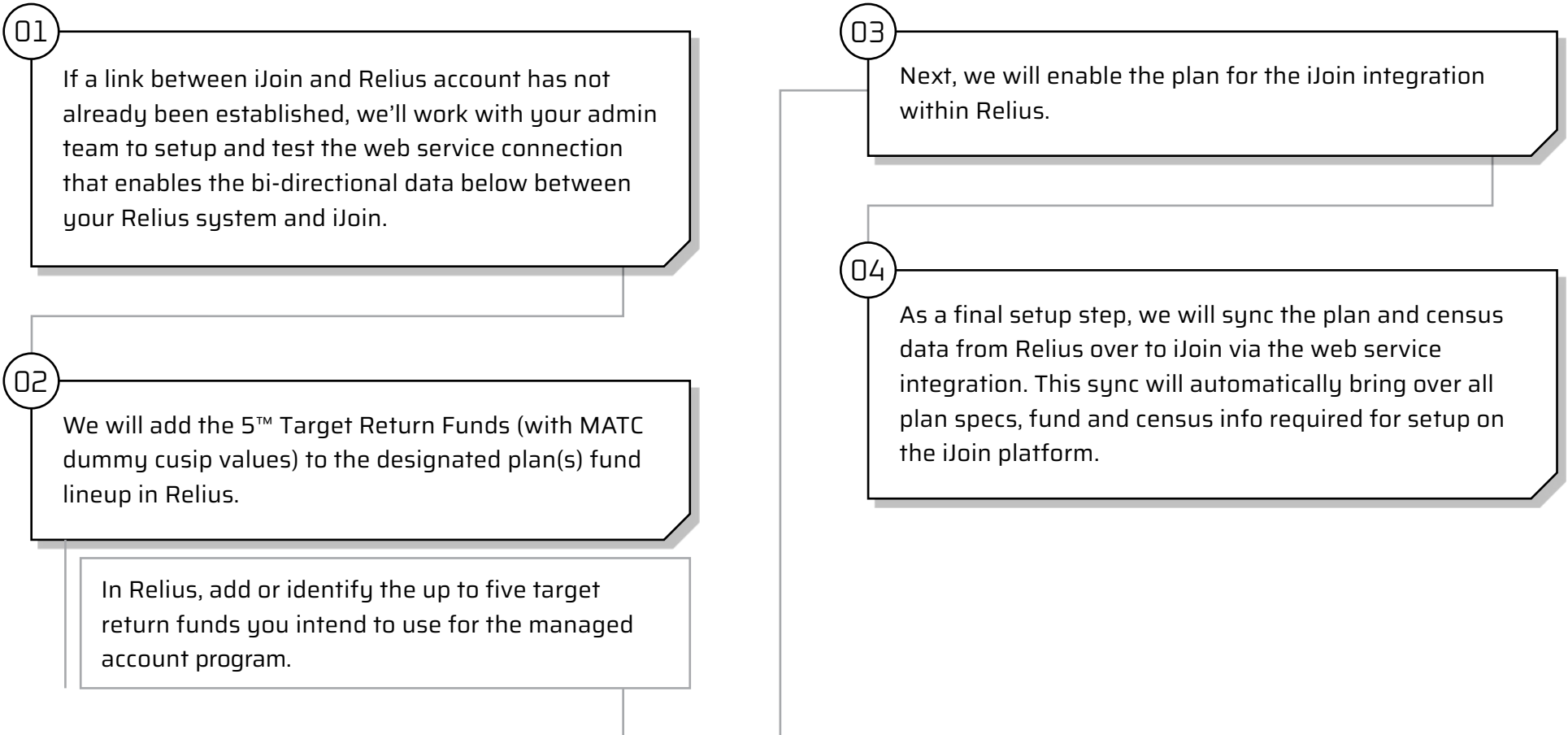
The purpose and goals of the kick-off call are:



# Weeks 1-2 // Training

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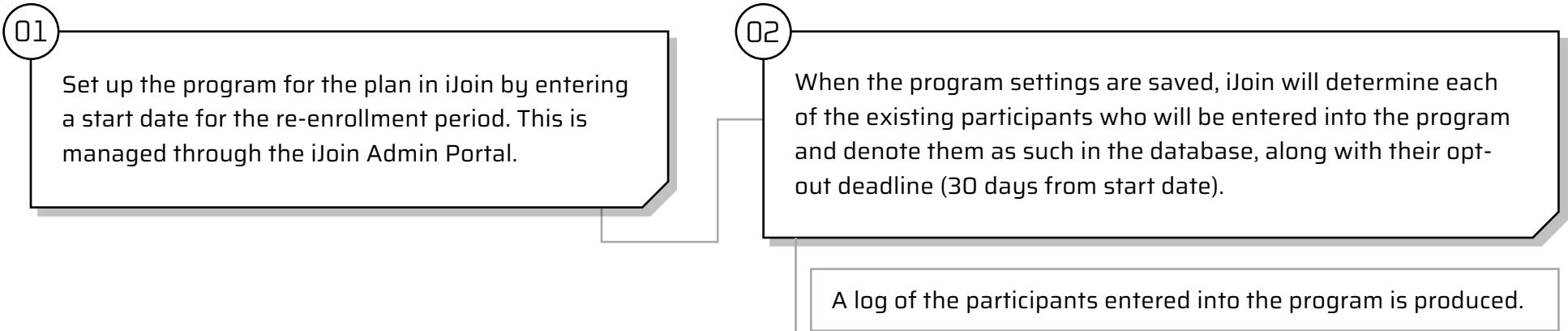
We will schedule and conduct a separate web-based training and implementation discussion with your assigned admin team member(s). We'll walk you through the Relius setup options, steps, and data flow so your team is comfortable with iJoin operations.



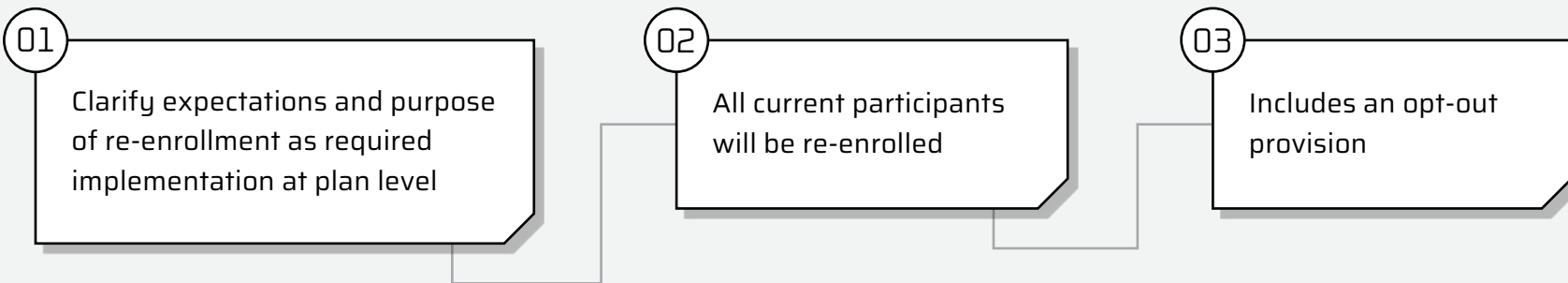
# Weeks 1-2 // Training

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If you intend to facilitate a re-enrollment of the plan, establish the re-enrollment date. Establish the start date of the MAP re-enrollment period for the plan. The start date is intended to be the beginning of the 30-day window within which a participant can opt out of the MAP. In the same window, an employee / participant can go through iJoin to refine their MAP recommendation.



We will discuss an overview of the re-enrollment process.



# Weeks 2-5 // Recordkeeper Implementation

01

In advance of or in conjunction with your start date, prepare the 30-day re-enrollment notice email templates that will be sent to each existing participant in the plan. We recommend that you edit the notice to include a link to the iJoin enrollment site. This link can vary. You may wish to link directly to our Relius Participant Web or directly to the iJoin site.

This link may be generic or customized based on our mutual implementation.

NOTE: This applies to both steps #2 and #3, described next.

02

On the start date, recordkeeper emails all existing participants the “iJoin MAP 30-Day Re-Enrollment Email Announcement” (Exhibit 1) using your preferred mass email method.

03

Three weeks following the send date of the 30-day announcement above in #2, recordkeeper emails all existing participants the “iJoin MAP 7-Day Re-Enrollment Email Announcement” (Exhibit 2) using your preferred mass email method.

04

Within 1-3 days of opt-out deadline, we recommend that you send a final follow-up notice to all participants who have not taken any action informing them that with no action they will be re-enrolled into the iJoin MAP and their account balance will be automatically reallocated.

NOTE: We will provide this sample email when available.

Continue on next page

# Weeks 2-5 // Recordkeeper Implementation

05

Once the re-enrollment deadline (30 days from start date) has passed, the iJoin system automatically re-allocates all participants who did not selectively opt out of the program to the appropriate Target Return Fund by initiating a transfer request in Relius for each applicable participant. You can monitor these transactions through the STP Queue.

At this time, the iJoin system will email a custom Personal Retirement Picture (PRP) statement to each participant. The PRP will recap the participant's situation, indicate their retirement preparedness through a percentage of goal, reinforce the Target Return Fund recommendation, and encourage the participant to revisit iJoin to refine their plan, should they wish.

On a quarterly basis we will reanalyze each MAP participant and automatically reallocate them to the most suitable target return fund for their situation. We will generate and email a current PRP statement showing the participant their progress toward goal and, again, encouraging them to engage with the application to take action toward refining their goal by increasing their contribution or making other retirement planning adjustments.

06

Post-event employee participant communication(s) to reinforce need to revisit/ refine recommendation

Message both those who opt-out and are "in"

## 01. Suggested frequency and content templates

- 1 week later
- 1 month later
- Quarterly thereafter

We will provide these sample emails when available.

## 02. Recordkeeper sends your message

EXHIBIT 1:

## iJoin MAP 30-Day Re-Enrollment Email Announcement

### PURPOSE:

This communication includes specific re-enrollment information and required notifications highlighting information on procedures, key dates and the “opt out” process for making investment decisions.

**GET THE FULL EMAIL CONTENT**

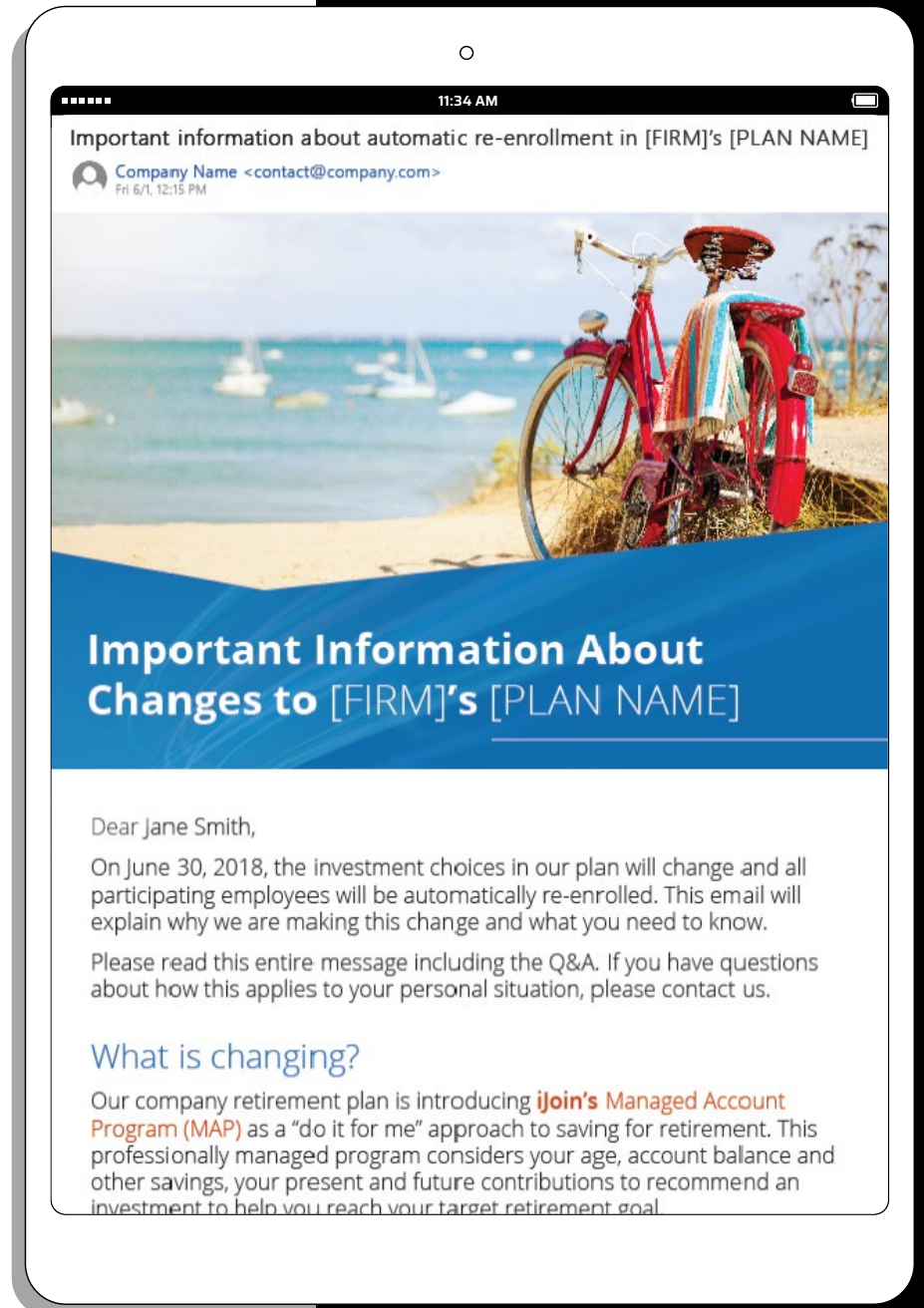




EXHIBIT 2:

## MAP 7-Day Re-Enrollment Email Announcement

### PURPOSE:

This communication includes specific re-enrollment information and required notifications highlighting information on procedures, key dates and the “opt out” process for making investment decisions.

**GET THE FULL EMAIL CONTENT**

