

Blackout Period Key Dates and Action Steps

The following chart of key dates provides a schedule of expected timing related to the retirement plan transition. Please reference this schedule as needed to plan for any actions you may wish to take.

Prior to and briefly following the merger, you will not have access to your accounts under the Genesis Health Plans and Trinity Health Plans. This is referred to as the “Blackout Period.” It is necessary to allow Transamerica to prepare its records for the transition to Fidelity, and for Fidelity to reconcile these records to establish your account(s) on its system. You will be notified when the Blackout Period ends.

You can also confirm whether the Blackout Period has started or ended by contacting Fidelity at 800-343-0860.

| Key Dates | Action Steps |
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| June 16, 2025 (by 4 p.m. Eastern) | <p>ONLY FOR PARTICIPANTS IN THE GENESIS HEALTH PLANS WHO HAVE ASSETS IN SCHWAB’S PERSONAL CHOICE RETIREMENT ACCOUNTS (PCRA)</p> <p>After this date, you will no longer be able to access or make changes in this account. Participants in the Genesis Health 401(k) Plan and Genesis Health 403(b) Plan will receive a separate communication in the mail with the details on your brokerage account transfer.</p> |
| Prior to June 23, 2025 (4 p.m. Eastern) | <p>TAKE ANY DESIRED ACTIONS BEFORE BLACKOUT PERIOD</p> <p>Once the Blackout Period begins, you will not be able to access or make changes to your accounts until the Blackout Period ends. This includes being unable to:</p> <ul style="list-style-type: none"> • Check your account balance. • Request a loan or distribution or minimum required distribution, if eligible. • Change your investment elections or rebalance the funds in your account. <p>If you wish to take any of these actions, you must do so before the Blackout Period begins by contacting Transamerica as follows:</p> <ul style="list-style-type: none"> ○ www.transamerica.com/portal ○ 800-755-5801 |
| June 23, 2025 (4 p.m. Eastern) | BLACKOUT PERIOD BEGINS |
| June 30, 2025 (4 p.m. Eastern) | <p>GENESIS HEALTH PLAN ACCOUNT BALANCES AT TRANSAMERICA ARE VALUED</p> <p>Your account balances will be valued at the close of the market in preparation for the transfer.</p> |
| July 1, 2025 | <p>GENESIS HEALTH PLAN ACCOUNT BALANCES AT TRANSAMERICA ARE TRANSFERRED</p> <p>Your account balances are scheduled to transfer to Fidelity and merge into the Trinity Health Plans.</p> |
| During the week of July 20, 2025 | <p>BLACKOUT PERIOD ENDS</p> <p>You will be notified when the Blackout Period has ended and that you have full access to your Trinity Health Plan accounts at Fidelity.</p> <p>Visit Fidelity NetBenefits® at www.netbenefits.com to set up your username and password. <i>If you already have accounts at Fidelity, you can use that same log in information to access your accounts.</i></p> <ul style="list-style-type: none"> • On NetBenefits® you can: <ul style="list-style-type: none"> ✓ Review your account balances. ✓ Request changes to your account. ✓ Review or update systematic withdrawals. ✓ Access investment option descriptions or research investment performance. ✓ Request a loan or distribution, if eligible. ✓ Add or update your beneficiaries. • Call 800-343-0860 to speak with a Fidelity representative who can answer questions and walk you through any transaction you want to make in your account. |
| Ongoing | You can log on to Fidelity NetBenefits® to access your account, tools, and resources. |

Questions? Contact Fidelity at 1-800-343-0860