



SAMPLE
THETA WORKPLACE SAVINGS PLAN

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- [Increase your contribution](#) amount whenever you feel ready.

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Be sure to consider all your available options and the applicable fees and features of each before moving your retirement assets.

The plan is intended to be a participant-directed plan as described in Section 404(c) of ERISA, which means that fiduciaries of the plan are ordinarily relieved of liability for any losses that are the direct and necessary result of investment instructions given by a participant or beneficiary.

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This is a sample only. Content could vary depending on plan and/or participant.

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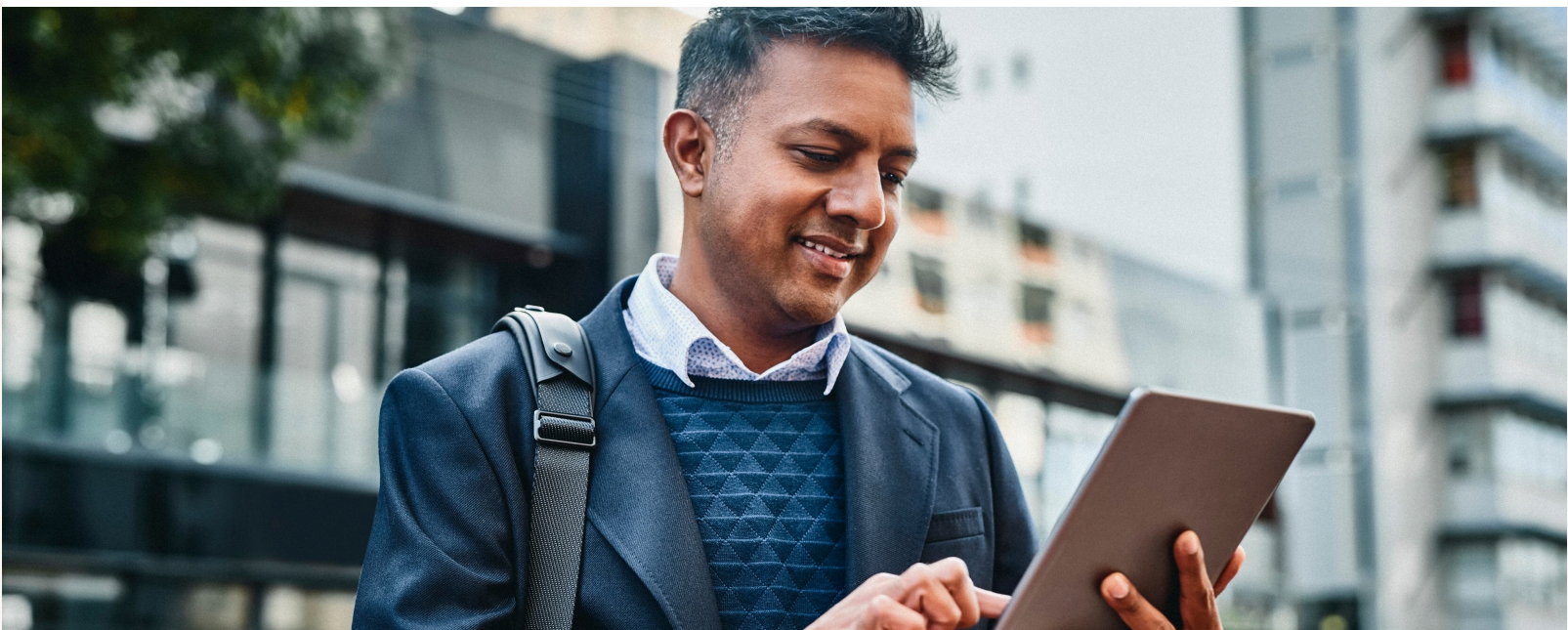
Subject: Julia, now that your retirement account is open, here's what's next

Preheader: Be on the lookout for important information about your account.



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