ASPIRE
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Aspire updates

Non-ERISA business | December 2022

Mailing address change reminder

Effective 1/1/2022, our mailing and remittance address changed. All mail should be directed to 9450 SW Gemini Dr. PMB 65198, Beaverton, Oregon 97008-7105. This included all mail, packages, and overnight shipments.

Checks should be mailed to MG Trust Company, LLC, ATTN TPA 000388, PO Box 3595, New York, NY 10008-3595. To ensure timely deposits, checks should be made payable to Matrix Trust Company - TPA 000388.

Contribution and payroll file submission

To avoid processing delays and "not in good order" submissions (NIGOs), we updated our policy and procedure on what is required.

Payroll files/rosters are to be submitted before receipt of funds and must include the following data points:

- Plan ID
- Plan name
- Participant name
- Participant complete SSN or Aspire account number
- Source(s)
- Dollar amount for each source
- Payroll date

Did you know about our specialized service team? Our Individual Account Team!

The Individual Account Team is an advisor-focused support team available Monday through Friday, 8:00 am – 5:00 pm (EST). This team is comprised of knowledgeable Relationship Managers ready to address all inquiries related to Aspire non-ERISA accounts for the financial advisor and their assistants. You can reach this team via email at iatservice@pcsretirement.com or by phone at 813-830-9300.

In addition, each broker dealer or advisory firm has a dedicated point of contact. If you are unsure who your contact is, please let us know so we can connect you.