

ICMA-RC is becoming



Transitioning to Our New Name: MissionSquare Retirement

Frequently Asked Questions

We're excited about our recent announcement to change our name to **MissionSquare Retirement**. As we've shared, our name change helps reflect our enriched focus and singular purpose of helping community-focused employees build retirement security. It also reinforces our values and commitment to serving those who serve others. Throughout our transition, we'll keep you informed. Below are responses to some of your frequently asked questions.

Q: Why are we changing our name and brand?

A: Our organization was founded in 1972 to help city and county managers prepare for retirement, and this focus was reflected in our previous name. From the beginning our mission has been focused on public sector employees as they build retirement security.

While our mission has never changed, it has grown. We've expanded to support *all* employees who serve their communities. With this growth came the need for a brand that represents both our foundation and our future.

Our new name, MissionSquare Retirement, reflects the diversity of our clients as well as our historic commitment to serving those who serve their communities. We remain dedicated to helping those who serve their communities build a secure financial future by providing retirement plans, investment options, and personalized guidance so they can make informed decisions and reach their financial goals with confidence.

Q: What does MissionSquare Retirement mean, and why did we choose it?

A: The words that make up our new name highlight why we do what we do, who we serve, and why people put their trust in us.

“Mission”: The focus on our mission — to help those who serve their communities build retirement security — sets us apart and is at the heart of the enduring partnerships we’ve built over nearly 50 years.

“Square”: From the term “town square,” this concept links our brand with the idea of a central gathering place, the hub of a community and those who represent it.

The radiating square within the name’s “o” represents the town square meeting place as a venue for new capabilities and ideas, while also symbolizing windows of opportunity for our clients.

Q: When does the name change go into effect?

A: We will begin the transition to our new name with our clients starting this summer. We will provide regular communications via email, phone, and our website throughout the transition.

Q: Can you provide more detail about what names are changing?

A: Effective this summer, ICMA-RC is changing its name to MissionSquare Retirement. Our legal name will remain ICMA-RC with our "Doing Business As" name changing to MissionSquare Retirement. Our contracts will not need to be updated at this time, and we will keep you informed as we progress with the transition.

Effective in fall 2021, some of our other brand names will be changing, including:

- Vantagepoint Investment Advisers (advisor to the funds) is changing to MissionSquare Investments
- Vantagepoint Funds is changing to MissionSquare Funds

More information will be provided as these dates approach.

Q: Will our Form W-9 need to be updated?

A: No. Your Form W-9 will not need to be updated based on our name change. In addition, our tax identification number continues to be the same.

Q: How are my participants being notified about the name change?

A: We've notified participants of this change through messages in Account Access, participant statements, and our contact center self-service phone line. We are also providing you with a toolkit, to include answers to frequently asked questions, that you can share with participants. We'll also continue to share information with participants throughout the process.

Q: Who can I reach out to with additional questions?

A: If you have additional questions, please reach out to your ICMA-RC representative or email us at missionsquareretirement@icmarc.org.

We look forward to sharing more information with you as we continue along this exciting journey!