

Daybright ASBO Model Plan Sample Emails

Email #1

Subject Line: ASBO 403(b) Model Plan: Informational Overview

Preheader: Help Avoid Audits and Penalties

Dear <Name>,

Recent federal legislation has put an ever-increasing administrative burden on school districts. If <School district>'s 403(b) plan isn't completely compliant, you may now risk significant penalties.

Daybright Financial (Daybright) recommends that now is the time to explore how the [ASBO International Model 403\(b\) Plan](#) framework can help.

As a participating provider, Daybright supports districts that make the decision to align with:

- stronger compliance practices
- less administrative complexity
- improved financial well-being for employees

[Learn more about the Model Plan framework](#)

With growing adoption among K–12 school districts nationwide, the ASBO Model Plan framework is being evaluated as a potential resource for districts seeking a more consistent, streamlined approach to retirement plan structure and compliance support.



U.S. OMNI & TSACG Compliance Services, a Partner Firm of Daybright Financial (formerly U.S. Retirement & Benefits Partners), was selected by ASBO International to serve as Third-Party Administrator (TPA) for the Model Plan. Daybright's TPA services are structured to offer a range of retirement solutions while remaining independent.

Daybright currently serves:

22,000+ Employer Clients

3.6M Participants

More than 50% of school districts in the U.S.

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An attorney should be contacted for advice on or review of the contract associated with the Model Plan. Disclaimer: ASBO International is a 501(c)(3) nonprofit organization. ASBO International does not provide legal, tax, or investment advice and does not endorse specific investment products or providers. The ASBO 403(b) Model Plan is offered as an educational and administrative framework. Participating providers operate independently, and districts are responsible for evaluating options based on local needs and requirements.



Daybright ASBO Model Plan Sample Emails

Email #2

Subject Line: Additional information on the ASBO 403(b) Model Plan

Preheader: Follow-up information on 403(b) plan oversight and compliance considerations

Dear <Name>,

<School district> wants to avoid lengthy audits and costly penalties due to noncompliance of your 403(b) plan.

That's why Daybright Financial (Daybright) recommends school districts choose the [ASBO International Model 403\(b\) Plan](#) and the services offered by participating providers such as Daybright.

Districts that choose to explore alignment with the Model Plan framework often review how it's designed to support a more consistent, manageable approach to plan oversight, including:

- **A vetted, turnkey retirement plan** that can help reduce risk and administrative responsibility
- **Time and cost savings** by outsourcing day-to-day plan operations, allowing staff to focus on educational priorities
- **Enhanced compliance support** to help align with federal regulations and generally recognized standards of care

Take advantage of this opportunity to reduce <School district>'s costs and enhance the overall management of your retirement plans. [Find out more today.](#)



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