



April 31, 2023

Re: PlanSource SSAE 18 SOC 2 Type 2 – Bridge Letter

To Whom It May Concern:

This letter is to serve as confirmation that the control environment that was confirmed in the SSAE 18 SOC 2 Type 2 audit has remained in place from June 30, 2022 to the present. There have been no subsequent events that influence the controls examined in the audit, including but not limited to illegal acts, fraud, errors, and/or design deficiencies.

You may provide this information to your auditors, but the information contained here-in is confidential and proprietary and should remain confidential.

Thank you for your business with PlanSource. If you have any questions regarding this letter, or the audit, please contact our Information Security Sales Support department at: securitysalessupport@plansource.com.

Sincerely,

David Gilbert

Sr. Mgr., Information Security Engineering and Operations