### THE OMNI GROUP - 403(b) Third Party Administrator

Go to OMNI's website www.omni403b.com

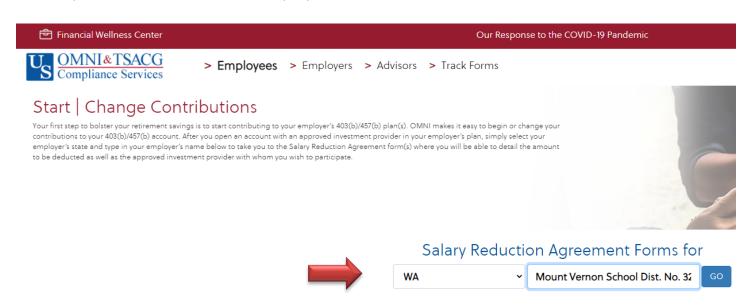
Aggregator ID / Group Number: 7371

Select "Employees"

Then "Start | Change Contributions"



Next step is to enter the state and employer name GO



# Employer Plan Info.

EMP STATE: Washington

EMP NAME: Mount Vernon School District No 320

## Select the type of Salary Reduciton Agreement:

# Step 1



## Start | Change Contributions

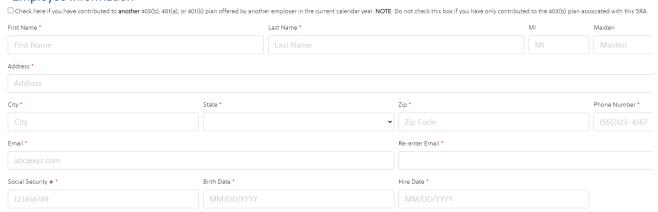
Your first step to bolster your retirement savings is to start contributing to your employer's 403(b)/contributions to your 403(b)/457(b) account. After you open an account with an approved investm employer's state and type in your employer's name below to take you to the Salary Reduction Agn to be deducted as well as the approved investment provider with whom you wish to participate.

### Salary Reduction Ag



# **Plan Details**

#### **Employee Information**



### Contribution Information



Please indicate what type of contributions you would like to declare.

- O Recurring Contributions
- One-Time Contributions (Elective Contributions Only)
- O I do not wish to participate at this time. I understand that I may participate in the future by filling out a new Salary Reduction Agreement form.

©2021 All rights reserved. No part of this SRA maybe reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopy, recording, or any information storage permission to reproduce content should be directed to the Legal Department at U.S. OMNI, Legal@omni403b.com

Step 2 and 3 is your specific investment information.

Note: You must have your date of hire and account number with one of the approved Participating Service Providers to complete this form.

# **Approved Providers:**

### YOUR 403(b)PLAN Notify OMNI of Service Provider Changes

403(B) Providers

AIG Retirement Services (formerly VALIC)

American Fidelity Assurance Co.

Ameriprise Financial/RiverSource

**Aspire Financial Services** 

Equitable (formerly AXA)

Great American Insurance Group \*\*

Invesco OppenheimerFunds

MetLife

Vanguard Fiduciary Trust Co.

Voya Financial (Reliastar)

Waddell & Reed Inc.

ROTH 403(B) Providers

ROTH - AIG Retirement Services (formerly VALIC)

ROTH - Aspire

ROTH - Equitable (formerly AXA)

ROTH - Invesco OppenheimerFunds

ROTH - MetLife

ROTH - Voya Financial (Reliastar)

Double asterisk (\*\*) notation indicates Service Providers which are no longer authorized to establish new accounts. Employees already contributing to one of these service providers may continue their contributions without interruption.

Upon approval, OMNI will transmit this information to the Mount Vernon School District to initiate the payroll deduction. If this information is received by the payroll department by the 15<sup>th</sup> of the month, the deduction will be processed with the current month's payroll unless indicated otherwise, this statement holds true with cancellations of deductions also.

### The OMNI Group

Water Tower Park 1099 Jay Street Building F Rochester, NY 14611 1-877-544-OMNI (6664) www.omni403b.com