

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

Go to OMNI's website [www.omni403b.com](http://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

Financial Wellness Center

US

OMNI & TSACG  
Compliance Services

> Employees > Employers

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 Agrn to be deducted as well as the approved investment provider with whom you wish to participate.

Salary Reduction A

403(b)

A Tax Sheltered Annuity ("TSA") is an investment account that is set aside for your retiree Employee individually, to hold assets of the Plan. Unless utilizing the catch-up provision:

- ☐ **!!New!! 403 (b) SRA Express Shortened Online Form**  
This Salary Reduction Agreement Short Form is being offered by OMNI to streamline
- ☐ 403(b) Online SRA Submission
- ☐ 403(b) SRA PDF Downloadable Version



Plan Details

Employee Information

☐ Check here if you have contributed to **another** 403(b), 401(a), or 401(k) plan offered by another employer in the current calendar year. **NOTE:** Do not check this box if you have only contributed to the 403(b) plan associated with this SRA.

First Name *	Last Name *	MI	Maiden
<input type="text" value="First Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="MI"/>	<input type="text" value="Maiden"/>
Address *			
<input type="text" value="Address"/>			
City *	State *	Zip *	Phone Number *
<input type="text" value="City"/>	<input type="text" value="State"/>	<input type="text" value="Zip Code"/>	<input type="text" value="(555)123-4567"/>
Email *		Re-enter Email *	
<input type="text" value="abc@xyz.com"/>		<input type="text" value=""/>	
Social Security # *	Birth Date *	Hire Date *	
<input type="text" value="123456789"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>	

## Contribution Information



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

- ☐ Recurring Contributions
- ☐ One-Time Contributions (Elective Contributions Only)
- ☐ 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.

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**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	
<b>403(B) Providers</b>	<b>ROTH 403(B) Providers</b>
AIG Retirement Services (formerly VALIC)	ROTH - AIG Retirement Services (formerly VALIC)
American Fidelity Assurance Co.	ROTH - Aspire
Ameriprise Financial/RiverSource	ROTH - Equitable (formerly AXA)
Aspire Financial Services	ROTH - Invesco OppenheimerFunds
Equitable (formerly AXA)	ROTH - MetLife
Great American Insurance Group **	ROTH - Voya Financial (Reliastar)
Invesco OppenheimerFunds	
MetLife	
Vanguard Fiduciary Trust Co.	
Voya Financial (Reliastar)	
Waddell & Reed Inc.	
<i>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.</i>	

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

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[www.omni403b.com](http://www.omni403b.com)