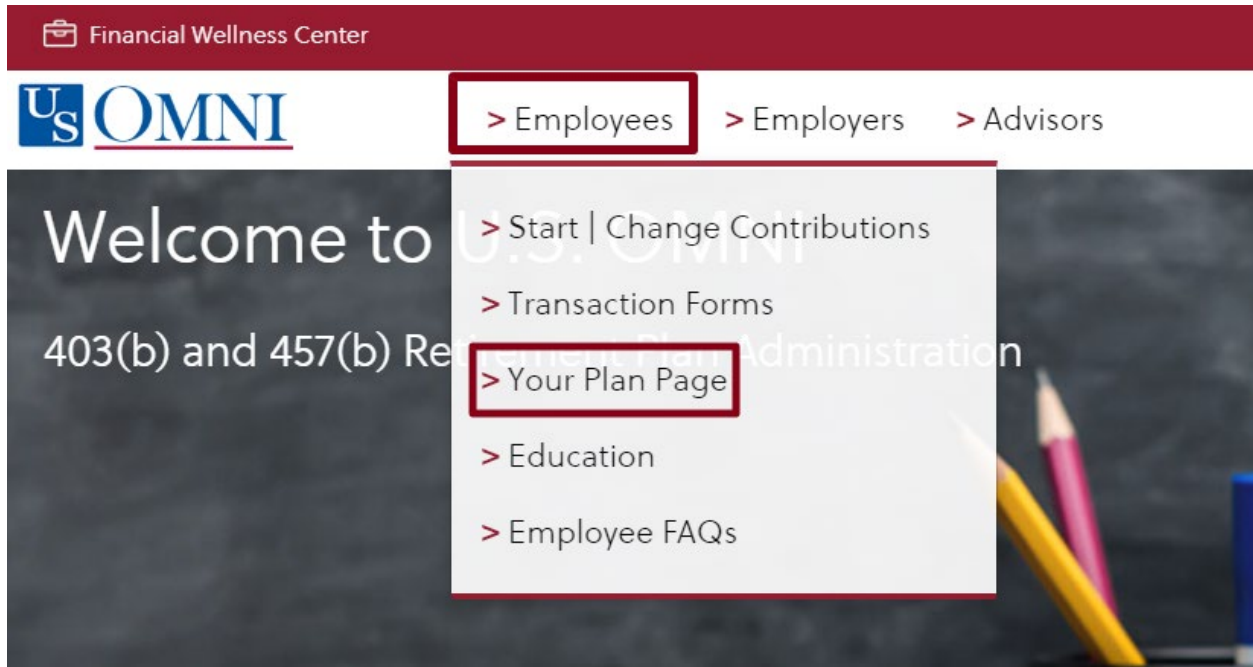


INSTRUCTIONS FOR 403b or 457 ACCOUNT SETUP

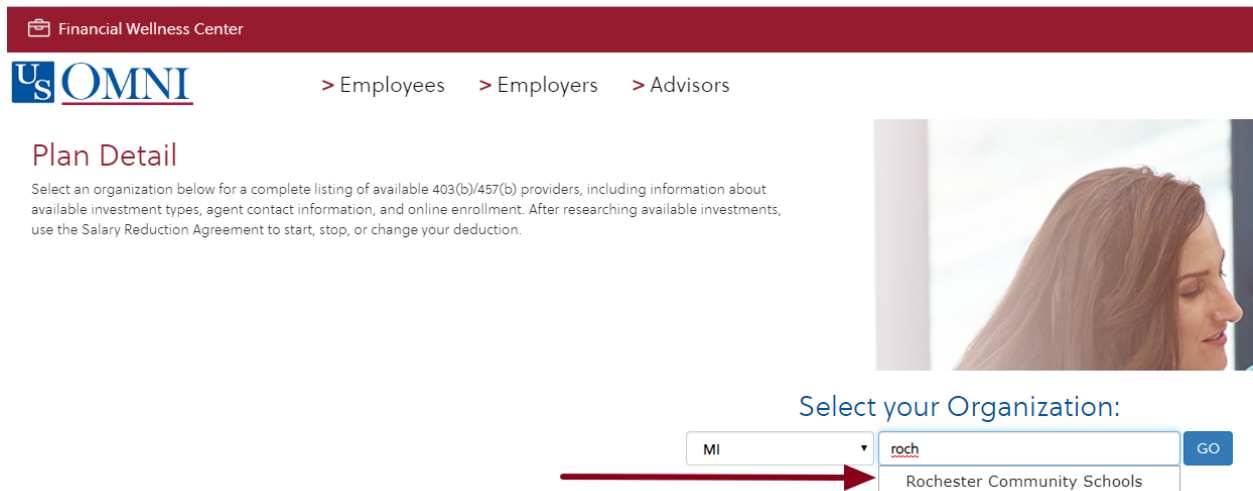
From the Payroll Department page on the district website. Scroll down to the 'Information' box and click on: OMNI 403(b) information. Then click on the link to the OMNI website –

www.omni403b.com

Once on the OMNI website, click on 'Employees' then go to 'Your Plan Page'.



You will then need to select your organization;



The next page will give the plan details for the 403b and 457 plans. Click on the different tabs depending which plan you would like to enroll in.

*For REA member only- per contract language years dated 2019-2021, matching funds are based on contributions to a 403b plan. Not all providers will accept an employer paid contribution, please speak to the individual provider prior to making your selection.

Plan Details for Rochester Community Schools, Rochester MI

403(b) 457(b)

Current Status: Active

Participating Investment Providers

Investment Types:	Fixed Annuity (F)	Fixed Index Annuity (FI)	Variable Annuity (VA)	Investment Advisory Service (RIA)	Mutual Funds (MF)	Not Offered	Phone
AIG Retirement Services (formerly VALIC)	●	○	○	○	○	○	1-888-569-7055
American Funds Service Company	○	○	○	○	○	○	Please contact provider
Ameriprise Financial Services, Inc.	○	○	○	○	○	○	1-800-297-2012
AXA Equitable Life Insurance Company	○	○	○	○	○	○	1-800-628-6673
Diversified Investment Advisors	○	○	○	○	○	○	Please contact provider
Fiduciary Trust Intl-Franklin Templeton	○	○	○	○	○	○	Please contact provider
Great American Insurance Group	○	○	○	○	○	○	1-800-438-3398 x1797
Invesco OppenheimerFunds	○	○	○	○	○	○	1-800-835-7305
Lincoln Investment Planning	○	○	○	○	○	○	1-800-242-1421 ext. 4500
Lincoln National	○	○	○	○	○	○	1-877-275-5462
LPL Financial Corporation	○	○	○	○	○	○	Please contact provider
MetLife	○	○	○	○	○	○	1-800-379-2519
Orion Portfolio Solutions, LLC (Formerly FTJ FundChoice)	○	○	○	○	○	○	Please contact provider
Paradigm Equities, INC.	○	○	○	○	○	○	Please contact provider
Putnam Investments	○	○	○	○	○	○	Please contact provider

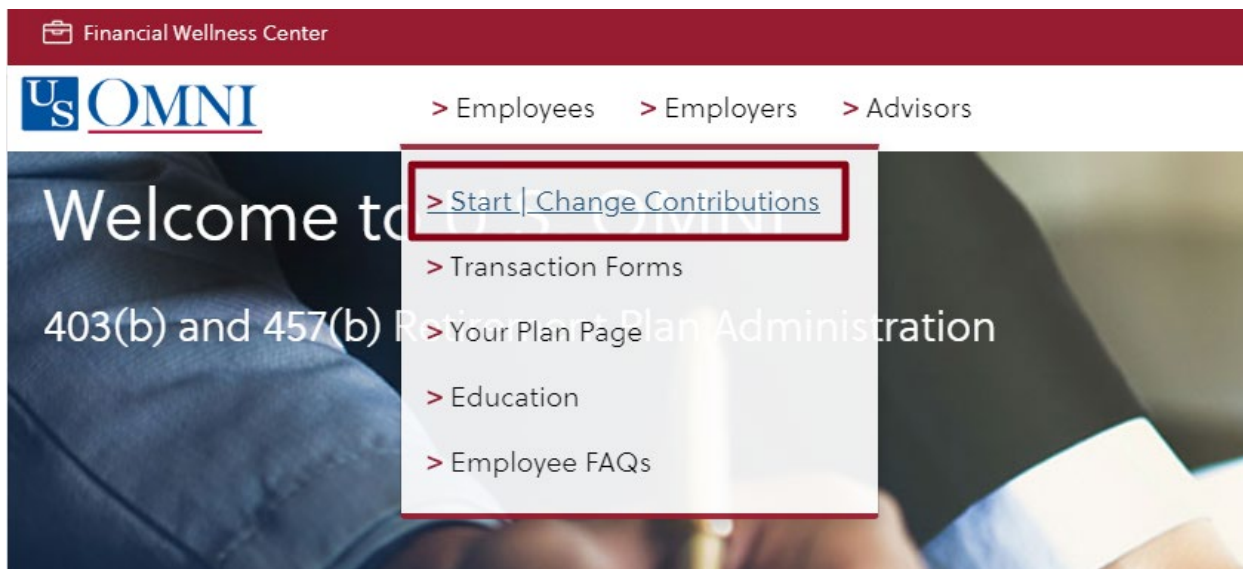
Click icons for Details: Online Enrollment Available Agent Contact Information Available Additional Information Available Upon Request

Grandfathered Funds
The following Investment Providers are no longer authorized to establish new accounts for this plan. Employees currently contributing to one of these Investment Providers may continue their contributions without interruption.
Mass Mutual VA **

For any questions concerning your employers list of participating providers, please contact our Customer Care Team at 1.877.544.OMNI (6664).

You may contact any of the listed Participating Service Providers either by phone or by visiting their website. THE DISTRICT CANNOT RECOMMEND A PROVIDER NOR OFFER INVESTMENT ADVICE. Please use the links provided on the OMNI website or speak to your financial advisor.

Once you have your account set up you will return to this same page to start your recurring or one-time contributions by completing a Salary Reduction Agreement.



OMNI offers three choices with the SRA form; the shortened express online form, standard online form or a downloadable PDF version. With all selections you will be required to enter your hire date. This information is available on Employee Online under the Home Address link.

You may set up recurring or one-time contributions. Keep in mind, if you wish to do both you may need to complete two Salary Reduction Agreements. The effective date is the date you wish to start the contributions.

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.

You will receive an email confirmation from OMNI that they have received your agreement with the date that your contribution will begin. Keep in mind this may differ from the effective date you entered depending on when you entered the information and the District pay period dates.