

Making Changes to your Retirement Plan Deferral Online

You can submit an annual deferral for your 403(b), Roth 403(b) or 457(b) deferral by accessing your retirement plan online. By accessing your plan online, you get

Accessing Plan Vue

Follow these step-by-step instructions to make changes to your retirement contribution:

1. Click the **Salary Re u tion Change** tab located at the top of the page. You can start deferrals, change

7. Enter your deferral amount in the **New Deferral Amount** column. Find the box that corresponds with your investment provider and enter the amount there.
 - If you wish to continue an existing deferral to a vendor, and are adding or changing another vendor, you will need to re-enter the amount you are keeping in the box that corresponds with that vendor.
 - If you do not, the deferral to that vendor will be cancelled. (Note: must retain ER & Roth if applicable)

403(b) Deferral Include

Contribution method: Dollar

Investment Provider	Current Deferral Amount	New Deferral Amount
American Fidelity (1062)	\$0.00	\$ 0
Americo Financial Life and Annuity	\$0.00	\$ 0
Ameriprise Financial Inc(1068)	\$0.00	\$ 0
Ameritas Life Insurance Corp	\$0.00	\$ 0
Annuity Investors (1096)	\$0.00	\$ 0
American United Life	\$0.00	\$ 0
Athene	\$0.00	\$ 0
AXA Equitable (1067)	\$0.00	\$ 0
CalSTRS	\$0.00	\$ 0
Commonwealth Annuity and Life Insurance	\$0.00	\$ 0
Fidelity Investments	\$0.00	\$ 0
Foresters Financial Services	\$0.00	\$ 0
Franklin Templeton (1025)	\$0.00	\$ 0
FTJ (1148)	\$0.00	\$ 0
GALIC (1092)	\$0.00	\$ 0
Great Southern Life Insurance Company	\$0.00	\$ 0
GWN (1113)	\$0.00	\$ 0
Hartford Life Insurance Company	\$0.00	\$ 0
Horace Mann (1014)	\$0.00	\$ 0
Industrial-Alliance (1135)	\$0.00	\$ 0
Voya (1058)	\$0.00	\$ 0
Voya (1059)	\$0.00	\$ 0
Legg Mason (1052)	\$0.00	\$ 0
Lincoln Investment Planning Inc.	\$0.00	\$ 0

Please contact us at 800.462.8326, ext. 4727

8. Ensure that your total allocation amount in the **New Deferral Amount** column matches the full amount you are electing to defer inclusive of all investment providers for that plan type.
9. Click the *'I authorize this investment election change'* box in order to authorize your elections and click next to proceed to the confirmation page.

10. Review your Current and New Deferral Amount(s) for accuracy. If they are correct, click "Next".

Waddell and Heed (11042) \$0.00 \$ 0

Western National Life Insurance Company \$0.00 \$ 0

RSG Securities (1174) \$0.00 \$ 0

AIG Annuity(8939) \$0.00 \$ 0

AIG Annuity(RN14) \$0.00 \$ 0

Western National Life (RN14) \$0.00 \$ 0

Veritrust (8012) \$0.00 \$ 0

Oppenheimer (9TOPPE) \$0.00 \$ 0

SchoolsFirst RBP (9TNRBP) \$150.00 \$ 200.00

TOTAL ALLOCATION \$150.00 \$ 200.00

> 403(b) Deferral

> Roth 403(b) Deferral Include

I authorize this investment election change

11. A confirmation number will appear when the system has finalized your request. A copy will be stored for you and can be accessed via the **Plan Summary** page under **Transaction Confirmations**, should you need it in the future.

12. Click done to complete the process.

Salary Deferral Change Request

2016 IRS Contribution limit is \$18,000.00. If you are over 50 (U) or will be the next 31 by December 31st of this year you can contribute an additional \$6,000.00 for a total of \$24,000.00 dollars. If you have any questions about the limits, please contact your Financial Advisor or your Plan Administrator, Eric SchoolsFirst, at 800.460.8318.

Thank you for submitting your request. We are working on it now.

Elections Confirmation

Investment Provider	Current Deferral Amount	New Deferral Amount
SchoolsFirst RBP (9TNRBP)	\$150.00	\$156.00
TOTAL ALLOCATION	\$150.00	\$156.00

A confirmation email will be sent to: beach0371@yahoo.com

Important information to note about your deferral elections:

- An account must be established with the investment provider prior to completing this process.
- Deferrals sent to an investment provider without an active account will result in a returned contribution.
- Salary deferral requests must be submitted 30 days before the effective date for your districts payroll cycle.
- If your request is not submitted in time to make the change requested for the current pay cycle, it will be effective for the following pay cycle.
- Online salary deferral changes are submitted to your district the following business day. Your changes will be applicable for the next available date.
- The change submitted online will supersede any instructions that you currently have on file.
- If multiple changes for the plan are submitted on the same day, the last entry will be considered the requested change.
- If you wish to continue an existing deferral to a vendor, and are adding or changing another vendor, you will need to enter the vendor and amount you are retaining. If you do not, the deferral to that vendor will be cancelled.
- If you want to have different amounts for future payroll deferrals, you will need to submit a change during each deferral period or submit the SRA with a future date. The PlanVue™ system does not allow future dated requests.

