



Quick Guide to Making Changes to Retirement Plan Deferral

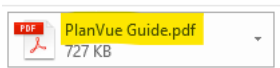
This process can be completed online or via hardcopy and fax. Please see directions for each method below.

Online Method

Log in to your Plan Vue account at pa.schoolsfirstfcu.org.

If you do not have an account, you can create an account by visiting pa.schoolsfirstfcu.org and enter the information as prompted.

After you created your account, open the attached file named PlanVue Guide and follow the step-by-step guide to make changes to your TSA.



Hardcopy and fax method

Determine if you have a 403(b) or 457(b) plan. Then, open the attached file that corresponds to your retirement plan.



Fax the form to Retirement Plan Administration at (714) 258-4262 or contact, Nayeli Parra nparrabarrientos@nmusd.us, in the Payroll Department with any questions or concerns.