

## Instructions for Completing 403(b) Paperwork

- ◆ Select a company from the TISD list of approved vendors located at [www.tomballisd.net](http://www.tomballisd.net). Once you have contacted a representative of your choice, please follow the steps below to complete your election.
- ◆ To add a new deduction please complete the following forms and send to:
  1. Salary Reduction Agreement
  2. 403(b) Disclosure Statement
  3. Complete application directly with the carrier of your choice.

Benefit Elect of Texas  
1940 Fountain View Dr  
PMB 113  
Houston, TX 77057  
Phone: 713.705.8754  
Fax: 855.710.7400  
Website: [www.beoftexas.com](http://www.beoftexas.com)

- ◆ To increase an existing deduction, you must only submit the following forms:
  1. Salary Reduction Agreement
  2. 403(b) Disclosure Statement
  3. Complete application directly with carrier.
- ◆ To decrease an existing deduction, you must only submit the following forms:
  1. Salary Reduction Agreement
- ◆ To transfer an existing contract from previous employer you must only submit the following forms and contact your carrier and notify them of the switch to your new District. **(Important note: Participant must contact carrier directly to notify them of a change in employer.)**
  4. Salary Reduction Agreement
  5. 403(b) Disclosure Statement

- ◆ **Processing Procedures:**

1. Benefit Elect of Texas will review all paperwork to verify that all required information is submitted.
2. If there is any missing information, the Sales Representative, if any, will be contacted. If there is no Sales Representative, the participant will be contacted directly.
3. All completed paperwork will be submitted to the payroll department so that deductions can be reflected in the next month's payroll cycle.
4. All paperwork must be received by the 1<sup>st</sup> day of the month in order to be included on that month's payroll.