

403(b) Plan Enrollment Instructions



These are instructions for **FIRST TIME USERS** creating a 403(b) account.

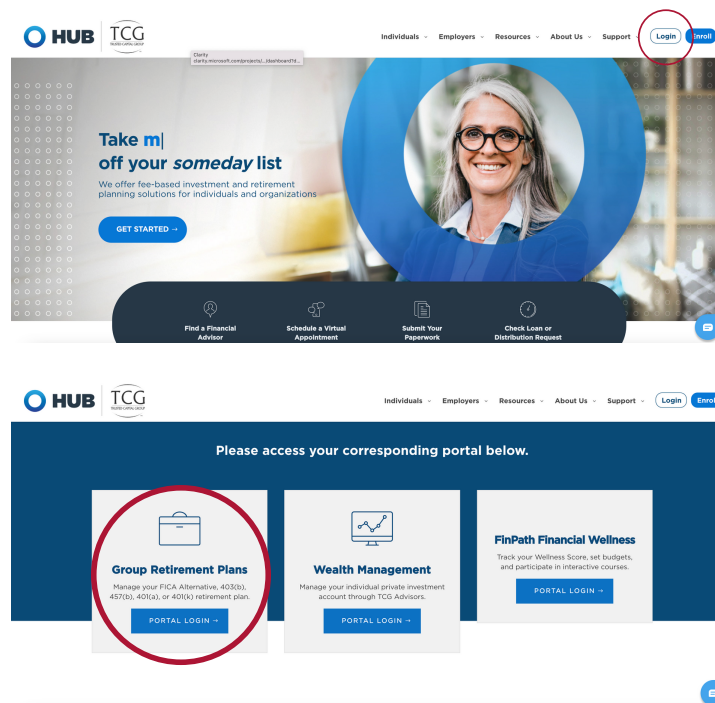
TRADITIONAL 403(b): This plan automatically deducts part of your salary into the retirement savings plan before taxes are taken out. The money grows tax-deferred until it's withdrawn, and then the taxes come due.

ROTH 403(b): This plan automatically deducts part of your salary into the retirement savings plan after taxes are taken out. The interest and earnings withdrawn from a Roth Account are tax-free if the distribution is considered "qualified."

REMINDER: You can have both a traditional and a Roth 403(b)—and contribute to one or both at the same time—if allowed by your plan.

NEW AND EXISTING USERS, START HERE.

1. Go to www.tcgservices.com to set up your salary deferral (contribution amount) and allocation. Click on **Login** then click **Group Retirement Login Portal**.



2a. **NEW USERS** click **New User**. Please continue to #4 for further instructions.

3. **NEW USERS** enter your (case sensitive) **Plan Password**; click **Next**.

- If you do not know your Plan Password, scroll lower in the gray box and click on your state's 403(b) Plan.
- Please contact customer service at 800.943.9179 if you need further assistance with the plan password.

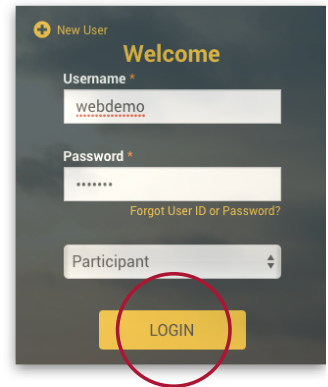
4. Create your Username and Password; enter all personal information; then click **Next**.

5. Investment Elections—Under the **403(b) Pretax Deferral** heading are listed all 403(b) investment funds offered or (if allowed in your plan) click **403(b) Roth Deferral** to reveal all investment funds available for Roth contributions.

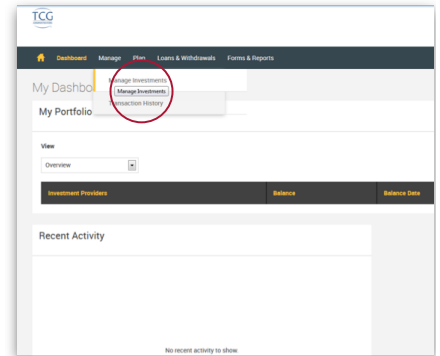
**NEW USERS skip next page.
Got to Step 7 on page 4.**

Investment Provider	Current IP Election	New IP Election
American Century Investments	\$0.00	\$ 0.00
American United Life	\$0.00	\$ 0.00
Americo Financial Life and Annuity Insurance	\$0.00	\$ 0.00
Annuity Investors Life Insurance (Great American)	\$0.00	\$ 0.00
Aspire Financial	\$0.00	\$ 0.00

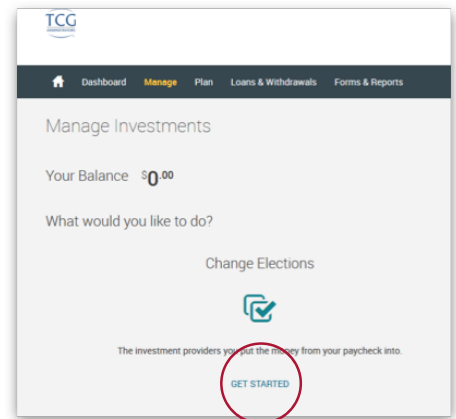
2b. **EXISTING USERS** enter your **Username** and **Password**; then select **LOGIN**.

A dark-themed login screen titled 'Welcome'. It features a 'New User' link at the top left. Below the title are input fields for 'Username' (containing 'webdemo') and 'Password' (masked with asterisks). A link 'Forgot User ID or Password?' is positioned below the password field. At the bottom, there is a 'Participant' dropdown menu and a yellow 'LOGIN' button, which is circled in red.

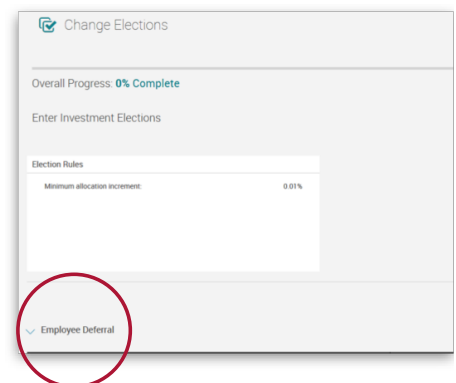
3. Click **Manage Investments** to view or change your current elections.

A light-themed dashboard screen with a top navigation bar containing 'Dashboard', 'Manage', 'Plan', 'Loans & Withdrawals', and 'Forms & Reports'. The 'Manage' tab is active. The main content area includes 'My Dashboard', 'My Portfolio', and 'Recent Activity'. A red circle highlights the 'Manage Investments' link in the 'My Portfolio' section.

4. This screen reveals your current 403(b) investment choices. To change amounts or vendors, click **GET STARTED**.

A 'Manage Investments' screen showing 'Your Balance' as '\$0.00'. It asks 'What would you like to do?' and provides a 'Change Elections' link with a checkmark icon. Below this, a message states 'The investment providers you put the money from your paycheck into.' A red circle highlights a 'GET STARTED' button at the bottom.

5. Now click **Employee Deferral** to reveal all 403(b) investment funds offered.

A 'Change Elections' screen showing 'Overall Progress: 0% Complete'. It includes a section for 'Enter Investment Elections' and 'Election Rules' with a table showing 'Minimum allocation increment' as '0.01%'. At the bottom, a red circle highlights the 'Employee Deferral' link.

6. Next you will apply the dollar amount of your contribution to the investment(s) of your choice.

6a. If you wish to make contribution on a pre-tax basis, click the 403(b) Pretax Deferral option and assign your elected amounts. Click the authorize checkbox to proceed with your enrollment.

Select Investments

Overall Progress: 50% Complete

Any changes submitted will be reflected on your current election report by 10:00 AM the following business day.
CAUTION: Changes you make to your investment elections take place immediately. Changes to your Total Election Amount Deducted per Pay Period take place after being processed by your employer. The new deduction per pay period you enter will replace the current default amount completely.
CAUTION: If you elect a percentage deduction, the percent you elect will be the percent deducted per pay period. (a total election of 50% = one half of your paycheck)

Investment Provider Elections

403(b) Pretax Deferral

Investment Provider	Current \$ Election	New \$ Election
American Century Investments	\$0.00	<input type="text" value="0.00"/>
American United Life	\$0.00	<input type="text" value="0.00"/>
American Financial Life and Annuity Insurance	\$0.00	<input type="text" value="0.00"/>
Annuity Investors Life Insurance (Great American)	\$0.00	<input type="text" value="0.00"/>
Argo Financial	\$0.00	<input type="text" value="0.00"/>
AXA Equitable Life Insurance	\$0.00	<input type="text" value="0.00"/>
CM Life	\$0.00	<input type="text" value="0.00"/>
Commonwealth Annuity	\$0.00	<input type="text" value="0.00"/>
FAMF Funds	\$0.00	<input type="text" value="0.00"/>
Federated Funds	\$0.00	<input type="text" value="0.00"/>
Fidelity Security Life Insurance Company	\$0.00	<input type="text" value="0.00"/>
Frost Investors	\$0.00	<input type="text" value="0.00"/>
Franklin Templeton Investments	\$0.00	<input type="text" value="0.00"/>
GWIN Securities Inc.	\$0.00	<input type="text" value="0.00"/>
Horseshoe Mann	\$0.00	<input type="text" value="0.00"/>
Industrial Alliance Pacific (acquired by Security Benefit)	\$0.00	<input type="text" value="0.00"/>
ISC Group	\$0.00	<input type="text" value="0.00"/>
Jefferson National Life Insurance Company	\$0.00	<input type="text" value="0.00"/>
Legend Group Inc.	\$0.00	<input type="text" value="0.00"/>
Lincoln Financial Group	\$0.00	<input type="text" value="0.00"/>
Lincoln Investment Planning Inc.	\$0.00	<input type="text" value="0.00"/>
Met Life	\$0.00	<input type="text" value="0.00"/>
Millard National Life Insurance Company	\$0.00	<input type="text" value="0.00"/>
Modern Woodmen of America	\$0.00	<input type="text" value="0.00"/>
National Life Group	\$0.00	<input type="text" value="0.00"/>
New York Life Insurance and Annuity Corporation	\$0.00	<input type="text" value="0.00"/>
North American Co For Life and Health Insurance	\$0.00	<input type="text" value="0.00"/>
Opportunity Funds Distributor	\$0.00	<input type="text" value="0.00"/>
Perlepage Retirement Services	\$0.00	<input type="text" value="0.00"/>
Plaidmember Servs Corp	\$0.00	<input type="text" value="0.00"/>
RiverSource Investments	\$0.00	<input type="text" value="0.00"/>
Rydex Investments	\$0.00	<input type="text" value="0.00"/>
Security Benefit	\$0.00	<input type="text" value="0.00"/>
Senatorial Group Funds	\$0.00	<input type="text" value="0.00"/>
Symetra Life Insurance Company	\$0.00	<input type="text" value="0.00"/>
T Rowe Price Trust Company	\$0.00	<input type="text" value="0.00"/>
The Vanguard Group	\$0.00	<input type="text" value="0.00"/>
Thrivent Financial for Lutherans	\$0.00	<input type="text" value="0.00"/>
Transamerica Life Insurance Co	\$0.00	<input type="text" value="0.00"/>
USAA Life Insurance Company	\$0.00	<input type="text" value="0.00"/>
Valic	\$0.00	<input type="text" value="0.00"/>
VONA Financial (Formerly ING Life)	\$0.00	<input type="text" value="0.00"/>
VONA Reaktor (Formerly ING Reaktor)	\$0.00	<input type="text" value="0.00"/>
Wellsf & Ford	\$0.00	<input type="text" value="0.00"/>
Western National Life Insurance Company	\$0.00	<input type="text" value="0.00"/>
	\$0.00	\$0.00

☐ I authorize the investment election changes to this money source

RESET TABLE

403(b) Roth Deferral

BACK

NEXT

6b. If you wish to make a Roth contribution, click the 403(b) Roth Deferral option and assign your elected amounts. Click the authorize checkbox to proceed with your enrollment.

Select Investments

Overall Progress: 50% Complete

Any changes submitted will be reflected on your current election report by 10:00 AM the following business day.
CAUTION: Changes you make to your investment elections take place immediately. Changes to your Total Election Amount Deducted per Pay Period take place after being processed by your employer. The new deduction per pay period you enter will replace the current default amount completely.
CAUTION: If you elect a percentage deduction, the percent you elect will be the percent deducted per pay period. (a total election of 50% = one half of your paycheck)

Investment Provider Elections

403(b) Pretax Deferral

403(b) Roth Deferral

Investment Provider	Current \$ Election	New \$ Election
American Century Investments	\$0.00	<input type="text" value="0.00"/>
Annuity Investors Life Insurance (Great American)	\$0.00	<input type="text" value="0.00"/>
Argo Financial	\$0.00	<input type="text" value="0.00"/>
AXA Equitable Life Insurance	\$0.00	<input type="text" value="0.00"/>
Federated Funds	\$0.00	<input type="text" value="0.00"/>
Frost Investors	\$0.00	<input type="text" value="0.00"/>
GWIN Securities Inc.	\$0.00	<input type="text" value="0.00"/>
Horseshoe Mann	\$0.00	<input type="text" value="0.00"/>
Legend Group Inc.	\$0.00	<input type="text" value="0.00"/>
Lincoln Financial Group	\$0.00	<input type="text" value="0.00"/>
Lincoln Investment Planning Inc.	\$0.00	<input type="text" value="0.00"/>
Met Life	\$0.00	<input type="text" value="0.00"/>
National Life Group	\$0.00	<input type="text" value="0.00"/>
Opportunity Funds Distributor	\$0.00	<input type="text" value="0.00"/>
Plaidmember Servs Corp	\$0.00	<input type="text" value="0.00"/>
Security Benefit	\$0.00	<input type="text" value="0.00"/>
Symetra Life Insurance Company	\$0.00	<input type="text" value="0.00"/>
T Rowe Price Trust Company	\$0.00	<input type="text" value="0.00"/>
Valic	\$0.00	<input type="text" value="0.00"/>
VONA Financial (Formerly ING Life)	\$0.00	<input type="text" value="0.00"/>
VONA Reaktor (Formerly ING Reaktor)	\$0.00	<input type="text" value="0.00"/>
	\$0.00	\$0.00

☐ I authorize the investment election changes to this money source

RESET TABLE

BACK

NEXT

7. Review all entries. Make any changes using the **Edit** buttons

Click **SUBMIT** when you are satisfied.

Dashboard Forms & Reports Plan Selection

Enrollment steps

Overall Progress: **66% Complete**

Confirm & Submit

If your enrollment information is correct, click below to submit your enrollment request.

Please Note:

This submission will not create an account with the Investment Providers. By completing this election, you agree to the terms of the electronic salary reduction agreement, that can be viewed by [clicking here](#)

Username: testusername
First name: TestUserFirst
Last name: TestUserLast
Street address 1: 3333 Test Street
Street address 2:
City: Test City
State: TX
Zip code: 77777
Country: USA
Date of birth: 05/11/2000
Date of hire: 08/12/2015
Home phone: (512) 600-5000
Office phone: (512) 600-6000 Ext
Other phone: (512) 600-7000
Home email address: testuser@gmail.com
Office email address:
Send email confirmation to: Home

Security Question

Security Question 1
What is your pet's name?
Answer 1
Mopsi

Investment Elections

Employee Deferral

All future contributions to the source will be invested as follows:

AXA Equitable Life Insurance : \$25.00
Jefferson National Life Insurance Company : \$25.00
Life Insurance Company of the Southwest : \$10.00
PlanMember Svcs Corp. : \$35.00
Rydex Investments : \$25.00
Transamerica Life Insurance Co : \$60.00

If your enrollment information is correct, click below to submit your enrollment request.

SUBMIT

8. Well done! You are finished! Your six-digit Confirmation Number will be emailed to you.

Please note: Your contribution may be cancelled if you have not set up an account with the vendor(s). To review your vendor registrations, **click here**.

TCG

Dashboard Forms & Reports

Enrollment steps

Overall Progress: **100% Complete**

✔ Congratulations! Your Account has been Created. The confirmation number for this transaction is: **348162**

You may access your account via the plan's website at any time using your Username and Password. If you elected to receive email confirmations, you will receive confirmation of your enrollment at the email address specified.

Reminders:

Your contribution may be cancelled if your Vendors and Products are not properly registered. To review your Product Registration, [click here](#).



TCG Administrators | 900 S Capital of Texas Hwy, Ste 350, Austin, TX 78746 | Office 800.943.9179 | Fax 888.989.9247 | www.region10rams.org

Disclosures:

Investment advisory services offered through TCG Advisors, an SEC Registered Investment Advisor. Insurance services offered through HUB International. TCG Advisors is a HUB International company.