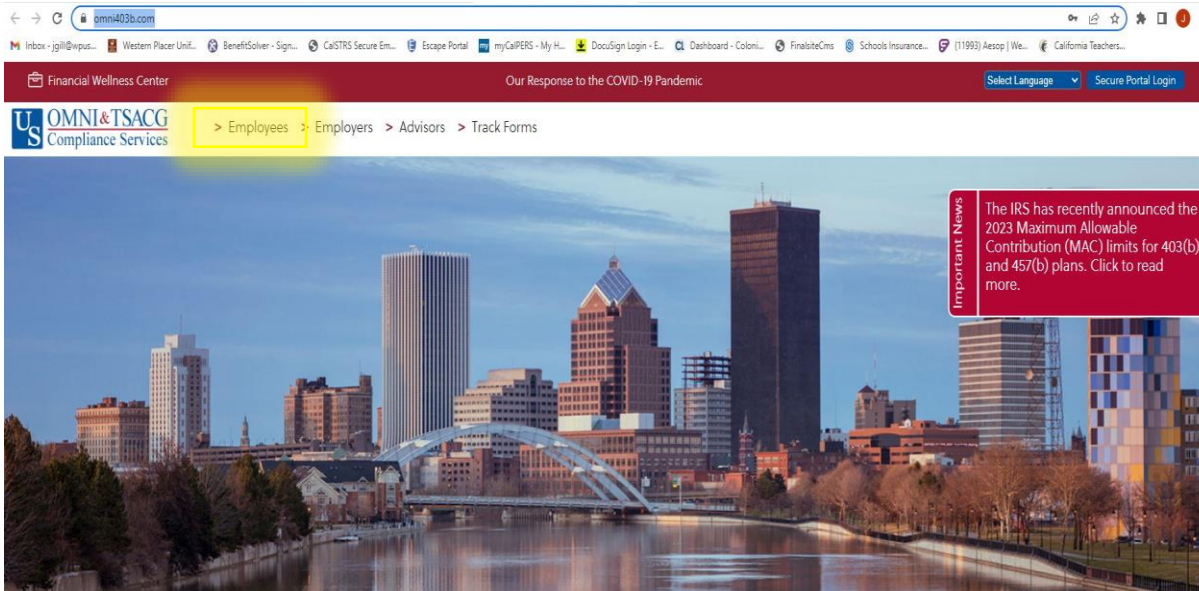
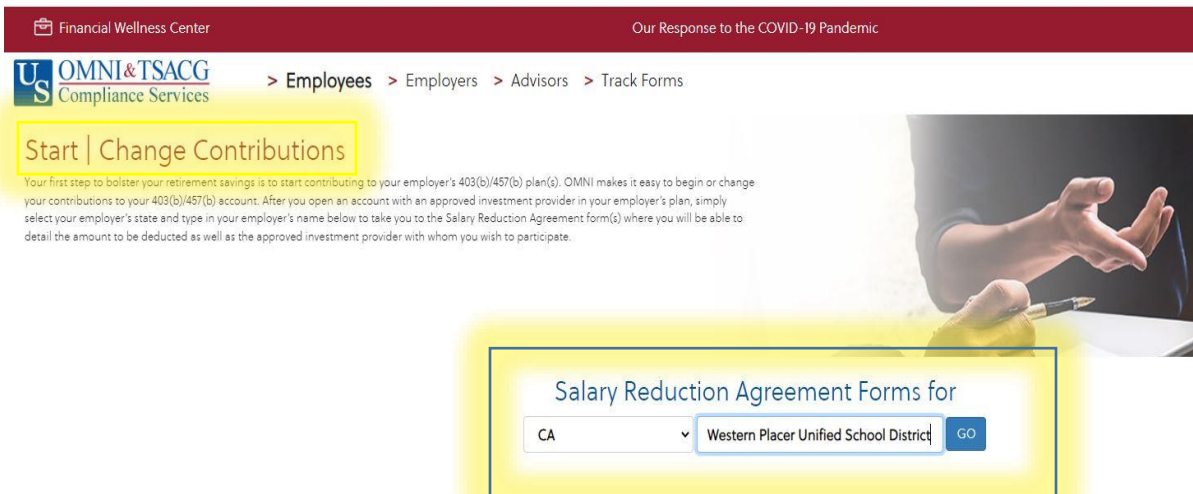


How to make a contribution change to your OMNI 403b or 457 online directly through OMNI

1. Go to the omni403b.com website (this can also be found under the district website – Payroll and Benefits - OMNI)



2. Hover over the EMPLOYEE menu and let it drop down. Select Start | Change Contributions. Select CA for state and start to type Western Placer (this should auto populate our school district). Once that is filled in press GO.



3. Select the tab for either a 403b or 457 and then select the "NEW 403(b) SRA Express Shortened Online Form" (same instructions if selecting the 457 tab). Select LETS BEGIN!

Salary Reduction Agreement Forms for Western Placer Unified School District Lincoln, CA

403(b) 457(b)

A Tax Sheltered Annuity ("TSA") is an investment account that is set aside for your retirement (only), and is paid for with "pre-tax" dollars. A Custodial Account ("CA") is the group or individual custodial account or accounts, established for each Employee, by the Employer, or by each Employee individually, to hold assets of the Plan. Unless utilizing the catch-up provisions, your Maximum Allowable Contribution ("MAC") cannot exceed \$22500 (\$30000 if age 50 or over) for 2023. Both TSA & CA receive tax deferred treatment.

!!New!! 403(b) SRA Express Shortened Online Form
This Salary Reduction Agreement Short Form is being offered by OMNI to streamline the process by which new participants may begin making recurring payroll deductions into a single investment account

- 403(b) Online SRA Submission
- 403(b) SRA PDF Downloadable Version

Let's begin!

4. Fill out requested information and select NEXT button.

5. Select Plan type from drop down menu. Select investment provider from drop down menu and the NEW AMOUNT YOU WANT TO CONTRIBUTE. (If you are already contributing \$250.00 but now want to contribute \$500.00 please fill out the Amount as \$500.00). Select NEXT.

6. Please provide the email that is best for OMNI to get in touch with you and then your full Social Security Number (without dashes in-between). Click SUBMIT TO OMNI

Financial Wellness Center Our Response to the COVID-19 Pandemic Select Language Secure Portal Login

US OMNI & TSACG
Compliance Services > Employees > Employers > Advisors > Track Forms

403(b) SALARY REDUCTION AGREEMENT FORM for Western Placer Unified School District [Lincoln, CA]

A Tax Sheltered Annuity ("TSA") is an investment account that is set aside for your retirement (only), and is paid for with "pre-tax" dollars. A Custodial Account ("CA") is the group or individual custodial account or accounts, established for each Employee, by the Employer, or by each Employee individually, to hold assets of the Plan. Unless utilizing the catch-up provisions, your Maximum Allowable Contribution ("MAC") cannot exceed \$22500 (\$30000 if age 50 or over) for 2023. Both TSA & CA receive tax deferred treatment.

Email: Social Security Number:

The above named Employee where applicable, agrees as follows:

- To modify his/her salary reduction(s) as indicated above.
- That his/her Employer transfers the above stated funds on Employee's behalf to OMNI for remittance to the selected Service Provider(s).
- This SRA is legally binding and irrevocable with respect to amounts paid.
- This SRA may be changed with respect to amounts not yet paid.
- This SRA may be terminated at any time for amounts not yet paid or available, and that a termination request is permanent and remains in effect until a new SRA is submitted.
- That OMNI does not choose the annuity contract or custodial account in which your contributions are invested.
 - OMNI does not endorse any authorized Service Provider, nor is it responsible for any investments.
 - OMNI makes no representation regarding the advisability, appropriateness, or tax consequences of the purchase of the TSA and/or CA described herein.
 - OMNI shall not have any liability whatsoever for any and all losses suffered by Employee with regard to his/her selection of the TSA and/or CA, its terms, the selection of any service provider, the financial condition, operation of or benefits provided by said service provider, or his/her selection and purchase of shares by any service provider. Nothing herein shall affect the terms of employment between Employer and Employee.
 - Employee acknowledges that Employer has made no representation to Employee regarding the advisability, appropriateness, or tax consequences of the purchase of the annuity and/or custodial account described herein.
 - The Employer shall not have any liability for any and all losses suffered by an Employee with regard to the selection(s) of any TSA and/or CA, any related terms and conditions, the selection of any service provider, the financial condition, operation of or benefits provided by any service provider or the selection and purchase of shares by any service provider.
- To be responsible for setting up and signing the legal documents necessary to establish a TSA or CA.
- To be responsible for naming a death beneficiary under their TSA or CA. This is normally done at the time the contract or account is established. Beneficiary designations should be reviewed periodically.
- That some service providers may take administration fees from your 403(b) account.
- When provided all required information in a timely manner, OMNI is responsible for determining that salary reductions do not exceed the allowable contribution limits under applicable law, and will complete MAC calculations as required by law.
- To contact OMNI and complete the appropriate OMNI forms for any requests for distributions, loans, hardship withdrawals, account exchanges plan-to-plan transfers or rollover contributions. Processing fees for the foregoing transactions may apply.
- This SRA is subject to the terms of the Services Agreement between OMNI and Employer, and to the Information Sharing Agreement between OMNI and the Service Providers, copies of which may be obtained from Employer.
- This agreement supersedes all prior salary reduction agreements and shall automatically terminate if Employee's employment is terminated.

By submitting this agreement to OMNI, I hereby confirm that the information on this form is correct and complete to the best of my knowledge. I certify that I have read this complete agreement and that my requested salary reduction(s), if in excess of my base limit, represent(s) my wish to utilize any catch-up provisions for which I may be eligible. I further certify that I will notify OMNI in the event I begin contributing to another 403(b), 401(k) or 401(a) plan. I understand my responsibilities as an Employee under this Program, and I request that Employer take the action specified in this agreement. I understand that all rights under the TSA or CA established by me under the Plan are enforceable solely by my beneficiary, my authorized representative or me. I certify that I have read this complete agreement and that my requested salary reduction(s), if in excess of my base limit, represent(s) my wish to utilize any catch-up provisions for which I may be eligible. I further certify that my salary reductions do not exceed contribution limits as determined by applicable law. I understand my responsibilities as an Employee under this Program, and I request that Employer take the action specified in this agreement. I understand that all rights under the annuity or custodial account established by me under the Program are enforceable solely by my beneficiary, my authorized representative or me.

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7. A few things to keep in mind.

If OMNI has any issues with your request they will email you using the email you have provided in step six.

Once they approve your request they will submit your request to WPUSD. Depending on the timeframe we will make the change on the next available end of month payroll. Our cutoff date for OMNI is to get us changes is around the 15th (you will need to have it to OMNI by the 10th of the month if you want to get it on that months' pay period).

If you have any additional questions you can reach out to the Payroll Department at 916.645.5131