

SIGNATURE REQUESTS

SUBMITTING REQUESTS

A copy of the provider's paperwork must be submitted to OMNI's Service Provider Department. The entire package must be provided. Please include your employer's name on the cover page as well as a phone number you can be reached at if further information is needed.

If the provider does not require an original signature:

FAX: 585-756-5557

EMAIL: serviceprovider@omni403b.com

If an original signature is required, please mail to:

The Omni Group
Watertower Office Park
1099 Jay Street, Building F
Rochester, NY 14611
ATTN: Service Provider Department

When the necessary validations have been completed, the paperwork will be signed and forwarded to your provider for processing. If you would prefer the paperwork be returned to you for submission, please indicate on a cover page. If mailing originals, please include a self-addressed stamped envelope if you do not want the paperwork sent to the provider.

To check status on requests, please contact Omni's Customer Care Department at 877-544-6664. Our representatives are available Monday through Friday from 7:30am to 8pm eastern standard time. If you are checking to ensure a fax or email have been received, please allow twenty-four hours so that we can update our records.

ADDITIONAL REQUIREMENTS:

Death Claims: Death Claims must include an original death certificate be mailed to the address above. We cannot accept faxes or scanned copies.

Disability: No additional paperwork is required.

Distribution: No additional paperwork is required. You must either be over the age of 59 ½ and/or separated from service to qualify for a distribution.

Exchange: No additional paperwork is required.

Hardship: Supporting documentation and Omni's Hardship Form is required, along with the provider's paperwork. A list of qualifying circumstances and acceptable supporting documentation can be found on our website at:

https://www.omni403b.com/forms_TransInstr.aspx. The provider's paperwork can be faxed to the number above to expedite. Omni's Hardship Request Form can be submitted on our website, no login is required. The form is located at: <https://www.omni403b.com/Forms.aspx>.

Loan: Omni's Loan Form is required, along with the provider's paperwork. The provider's paperwork can be faxed to the number above to expedite. Omni's Loan Request Form can be submitted on our website, no login is required. The form is located at: <https://www.omni403b.com/Forms.aspx>.

Qualified Domestic Relations Order (QDRO): A copy of the signed QDRO for processing, we are unable to accept your service provider's paperwork. Additionally, OMNI will review any proposed/draft orders to prior to submitting them to the court.

Rollover: No additional paperwork is required.

Service Credit: No additional paperwork is required.

Transfer: No additional paperwork is required.