

403(b) Plan Enrollment Instructions



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

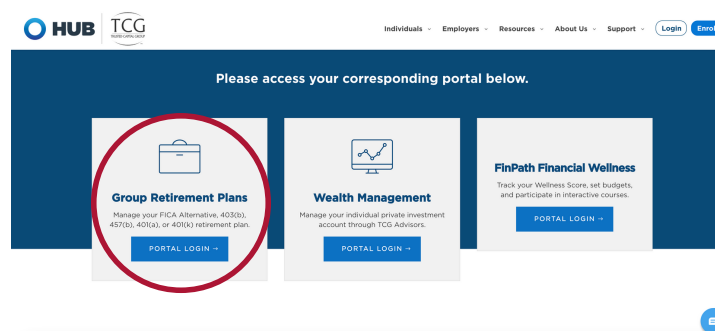
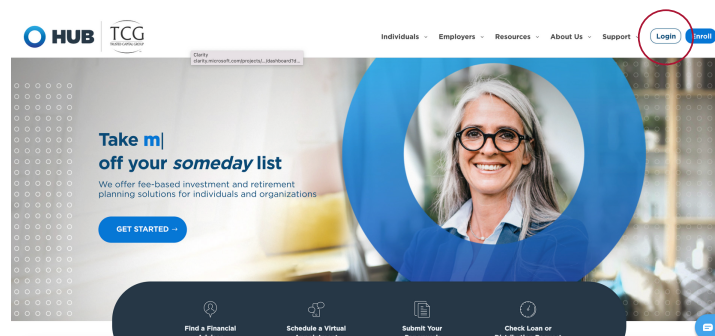
TRADITIONAL 403(b): This plan automatically deducts part of your salary into the retirement savings plan before taxes are taken out. The money grows tax-deferred until it's withdrawn, and then the taxes come due.

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 The interest and earnings withdrawn from a Roth Account are tax-free if the distribution is considered "qualified."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.

Welcome

Username *

Password *

Forgot User ID or Password?

Participant

LOGIN

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.

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New User

Plan Password *

Note: the password is case sensitive. If you fail to login three consecutive times your account could be disabled.

CANCEL NEXT

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

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Personal Information

Overall Progress: 0% Complete

Username Information

Items marked with an asterisk (*) must be completed before you can proceed to the next step.

Establish your username *

Establish your password *

Remember your Username and Password. You will need them to access your account via the plan website in the future.

Security Questions and Answers

Your Personal Information

First name * Last name *

Date of birth (mm/dd/yyyy) * Date of hire *

Gender * Marital status *

Street address * City * State * Zip *

Country * Home phone * Office phone * Other phone *

Email *

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.**

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 deferral amount completely.

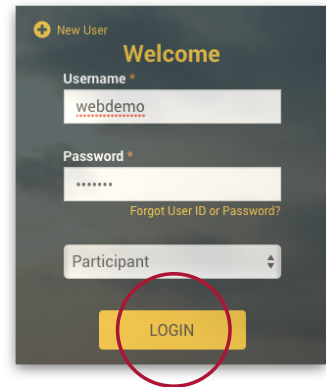
CAUTION: If you select a percentage deduction, the percent you elect will be the percent deducted per pay period. (a total election of 50% = one half of your paycheck)

Investment Provider Elections

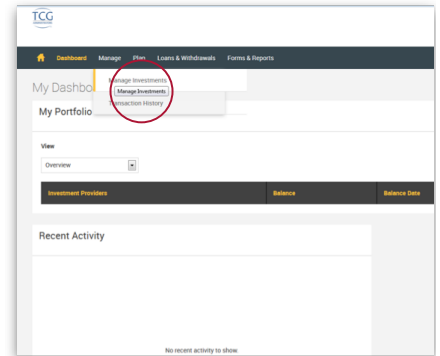
403b Pretax Deferral

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

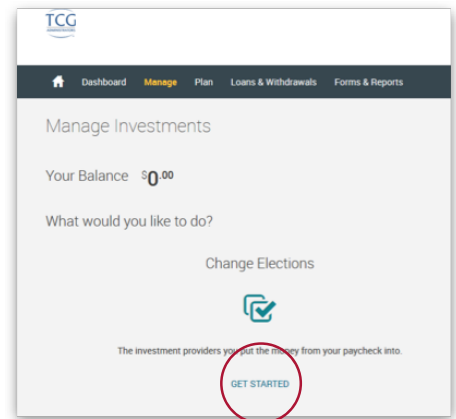
2b. **EXISTING USERS** enter your **Username** and **Password**; then select **LOGIN**.

A login screen with a dark background. At the top left is a 'New User' link with a plus icon. The main heading is 'Welcome'. Below it are fields for 'Username' (containing 'webdemo') and 'Password' (containing '*****'). A link 'Forgot User ID or Password?' is next to the password field. Below these is a 'Participant' dropdown menu. At the bottom is a yellow 'LOGIN' button, which is circled in red.

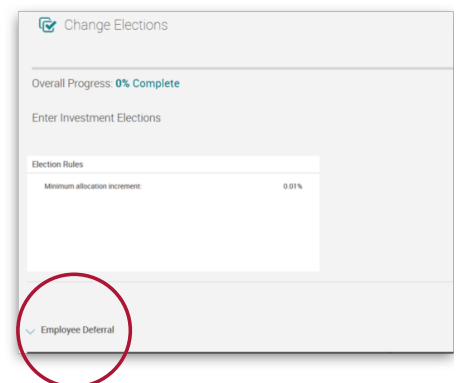
3. Click **Manage Investments** to view or change your current elections.

A dashboard screen with a light blue header. The header contains links: Dashboard, Manage, Plan, Loans & Withdrawals, and Forms & Reports. The 'Manage' link is circled in red. Below the header, there's a 'My Dashboard' section with a 'My Portfolio' link. Below that is a 'View' dropdown menu. At the bottom is a 'Recent Activity' section.

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

A 'Manage Investments' screen. It shows 'Your Balance' as '\$0.00'. Below that is the question 'What would you like to do?' followed by a 'Change Elections' link with a checkmark icon. At the bottom, there's a 'GET STARTED' button, which is circled in red.

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

A 'Change Elections' screen. It shows 'Overall Progress: 0% Complete'. Below that is a section 'Enter Investment Elections' with a table 'Election Rules' containing 'Minimum allocation increment' and '0.01%'. At the bottom is a link 'Employee Deferral', which is circled in red.

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

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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](#).



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Disclosures:

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