



Educational Services That Transform Lives

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Memorandum

To: Benefit Eligible Employees
From: Human Resources, Benefits HRBenefits@esboces.org
Re: 403b and 457 Plans and OMNI

The OMNI Group manages ESBOCES' 403b and 457 plans for our employees. Employees are advised to contact OMNI directly to set up a 403b and/or 457 retirement account. All new enrollments and/or changes to existing accounts, must be done through OMNI.

If you are interested in opening up, or making a change to an existing, 403b and/or 457 retirement account(s), please follow these steps:

Please go to: <https://www.omni403b.com/> for information, forms, to enroll or make changes. From OMNI's home page, please follow these steps to get to ESBOCES group information: Click on "Employees", then "Your Plan Page", Complete both the State and Employer information boxes and hit "GO". It should bring you to: <https://www.omni403b.com/plandetail/170> - the "Plan Detail" page should appear for ESBOCES. The full list of all Participating Investment Providers can be found on this page. There are two separate tabs- one for 403b plan information, and the other tab for 457 Deferred Compensation Plan information.

To open a 403b from the list of Participating Investment Providers:

Step 1- Select the Participating Investment Provider" of your choice. Then open your account directly with that provider. You may be able to open directly on the Participating Investment Providers' website, or through a broker.

Step 2- After you receive confirmation from your Participating Investment Provider that your 403b account is open, you must complete the Salary Reduction Agreement form on OMNI's website at:

<https://www.omni403b.com/SRA/Landing/170?sel=True>

In order to complete the online "Salary Reduction Agreement" form, you will need your Participating Investment Providers name (i.e. Aspire, MetLife, Vanguard, etc., the account name, and account number).

The SRA form is required because you are giving permission to have payroll deductions taken out to go directly into your 403b account.

If you wish to enroll in the 457 Deferred Comp Plan, please click on the separate tab marked "457(b)" and it will have information that will re-direct you to the NYS 457 Deferred Compensation Plan information website. ESBOCES' 457 Deferred Compensation Plan ID# is: 211251.

The online Salary Reduction Agreement Form must be completed when opening or changing any type of election for 403b and/or 457 plans, also for retirees electing to shelter vacation time (if applicable) at retirement. The SRA form can be found on OMNI's website. Please submit the completed SRA form directly to OMNI for processing. OMNI will process the information and notify ESBOCES' Payroll Department to start up your authorized payroll deductions.

403b and/or 457b Deferred Comp. plans accounts may be opened at any time. There are no deadlines, or open enrollment periods.

For retirees electing to shelter vacation time instead of having it paid out, you must complete a Salary Reduction Agreement form indicating the amount you wish to shelter (one-time)

Any questions, please contact OMNI directly:

Local: [585.436.OMNI \(6664\)](tel:585.436.OMNI(6664))

Toll Free: [1.877.544.OMNI \(6664\)](tel:1.877.544.OMNI(6664))

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