

403(b) Plan Enrollment Instructions



These instructions are for creating and accessing a traditional 403(b) account and/or a Roth 403(b) account.

Traditional 403(b)

Selecting pre-tax contributions allows you to contribute a portion of your salary to a retirement savings account before taxes are taken out. The money invests tax-deferred, meaning you don't pay taxes on the contributions or earnings until you withdraw the funds.

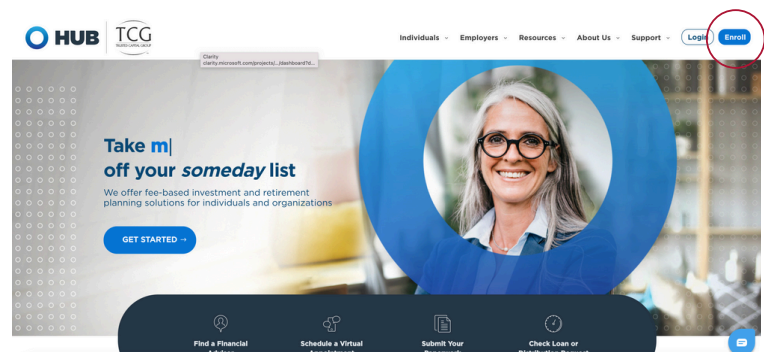
Roth 403(b)

Selecting Roth contributions allows you to contribute a portion of your salary to a retirement savings account after taxes are taken out. The interest and any earnings withdrawn from a Roth account are tax-free if the distribution is considered "qualified."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.

1. Go to www.tcgservices.com and click enroll **Enroll**



2. Type the name of your **Employer** in the search box and click **Enroll** on the **403(b) Savings Plan**.

3. Scroll through the approved vendor list and select **Enroll Now** for the vendor you want to choose.

Reminder: If you have not established a 403(b) vendor account for this employer prior to enrolling with TCG to establish contributions, your contributions may be canceled and/or refunded back and not invested. The 403(b) vendor account needs to be open and ready to accept funds, specific to this employer, and would need to be a current approved vendor for this employer. If you have any additional questions on this process, contact us.

If your plan allows Roth and you're choosing to contribute Roth funds, you'll need to confirm with your 403(b) vendor if your account can accept Roth funds - even if the vendor can accept Roth overall for the plan. You'll need to discuss this with your vendor directly to avoid suspense and/or returned contributions.

4. Enter your **Social Security number** to continue.

EXISTING USERS

If the website indicates that “a user name and password already exists,” you'll follow the remainder of these enrollment instructions, but you'll use your existing TCG username and password.

NEW USERS

Enter your Social Security Number as the **username**, and your birthday in numerical digits (MMDDYYYY) as the **password**.

For example:

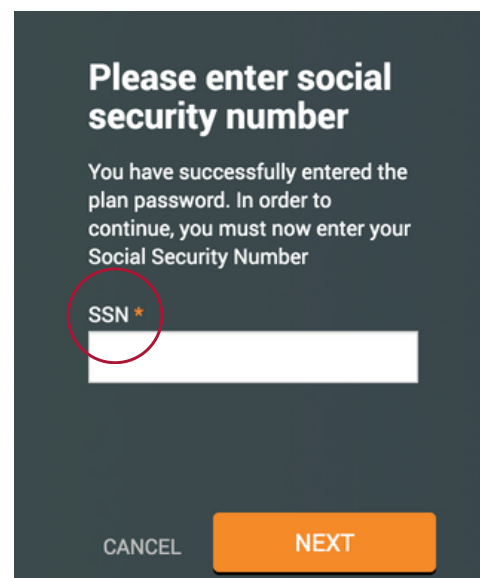
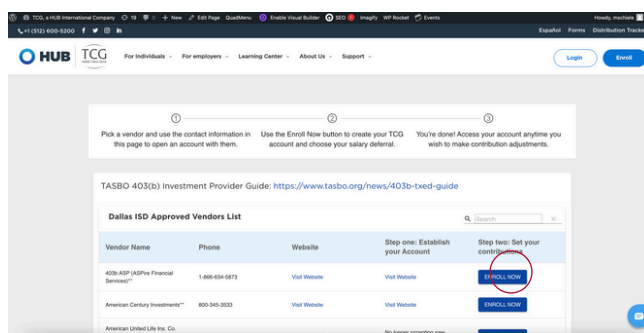
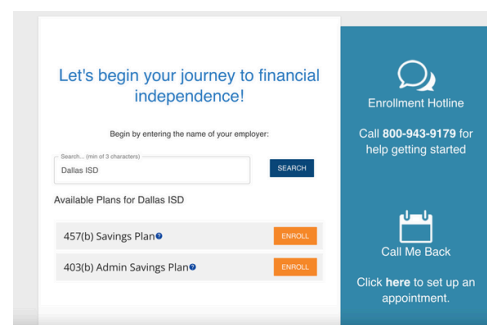
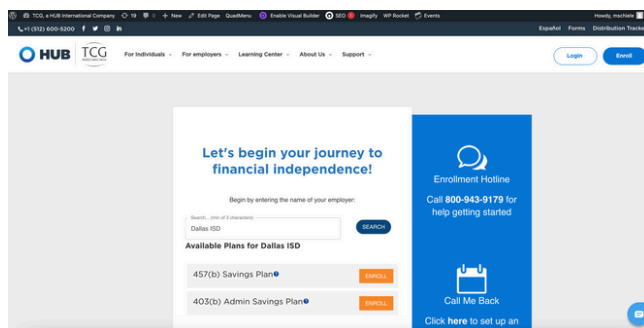
Social Security number: 123-45-6789

Birthday: 01/02/1980

Username: 123456789

Password: 01021980

If you are still unable to login, please call **(800) 943-9179**



5. Create your Username and Password; enter all personal information; then click **NEXT**.

6. Investment Elections—Under the **403(b) Pretax Deferral** heading are listed all of the current approved 403(b) vendors for your plan or (if allowed in your plan) click **403(b) Roth Deferral** Roth Deferral to reveal the approved vendors that can accept Roth contributions

Reminder: If you have not established a 403(b) vendor account for this employer prior to enrolling with TCG to establish contributions, your contributions may be canceled and/or refunded back and not invested. The 403(b) vendor account needs to be open and ready to accept funds, specific to this employer, and would need to be a current approved vendor for this employer. If you have any additional questions on this process, contact us.

If your plan allows Roth and you're choosing to contribute Roth funds, you'll need to confirm with your 403(b) vendor if your account can accept Roth funds - even if the vendor can accept Roth overall for the plan. You'll need to discuss this with your vendor directly to avoid suspense and/or returned contributions.

Investment Provider	Current IP Election	New IP Election
American Century Investments	\$0.00	\$ 0.00
American Century 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
Applifin Financial	\$0.00	\$ 0.00

7. Next you will apply the dollar amount you want deducted per pay period to go to the 403(b) vendor of your choice that you've contacted and created an account for specifically for this employer.

7a. 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 deferral 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 100% = one half of your paycheck)

Investment Provider Elections

403(b) Pretax Deferral

Investment Provider	Current % Election	New % 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%
Apex 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 Insurance	\$0.00	0.00%
Franklin Templeton Investments	\$0.00	0.00%
GWIN Securities Inc.	\$0.00	0.00%
Honore 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%
Mut Life	\$0.00	0.00%
Millard 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%
Pershing Retirement Services	\$0.00	0.00%
Pfizer/Johnson & Johnson	\$0.00	0.00%
RiverSource Investments	\$0.00	0.00%
Rydex Investments	\$0.00	0.00%
Security Benefit	\$0.00	0.00%
Seitronics 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%
VITA Financial (Formerly VITA Life)	\$0.00	0.00%
VITA Financial (Formerly VITA Life)	\$0.00	0.00%
Wells Fargo Bank	\$0.00	0.00%
Western National Life Insurance Company	\$0.00	0.00%

☐ I authorize the investment election changes to this money source

RESET TABLE

403(b) Roth Deferral

BACK NEXT

7b. 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 deferral 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 100% = one half of your paycheck)

Investment Provider Elections

403(b) Roth Deferral

Investment Provider	Current % Election	New % Election
American Century Investments	\$0.00	0.00%
Annuity Investors Life Insurance (Great American)	\$0.00	0.00%
Apex Financial	\$0.00	0.00%
AXA Equitable Life Insurance	\$0.00	0.00%
FAMF Funds	\$0.00	0.00%
Fidelity Investments	\$0.00	0.00%
GWIN Securities Inc.	\$0.00	0.00%
Honore 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%
Mut Life	\$0.00	0.00%
National Life Group	\$0.00	0.00%
Opportunity Funds Distributor	\$0.00	0.00%
Pershing Retirement Services	\$0.00	0.00%
RiverSource Investments	\$0.00	0.00%
Rydex Investments	\$0.00	0.00%
Security Benefit	\$0.00	0.00%
Seitronics Life Insurance Company	\$0.00	0.00%
T Rowe Price Trust Company	\$0.00	0.00%
Valic	\$0.00	0.00%
VITA Financial (Formerly VITA Life)	\$0.00	0.00%
VITA Financial (Formerly VITA Life)	\$0.00	0.00%
Wells Fargo Bank	\$0.00	0.00%
Western National Life Insurance Company	\$0.00	0.00%

☐ I authorize the investment election changes to this money source

RESET TABLE

BACK NEXT

8. Review all entries. Make any changes using the Edit buttons

Click **SUBMIT** when you are satisfied.

Overall Progress: **66% Complete**

Almost Done! 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 Provider. By completing this election, you agree to the terms of the electronic salary reduction agreement, that can be viewed by clicking here

Username: JaneDoeX12 [Edit](#)

First name: Jane

Last name: Doe

Middle name:

Street address 1: 12435 Park Williamson

Street address 2:

City: Dallas

State: TX

Zip code: 75051

Country:

Date of birth: 01/01/1980

Date of hire: 01/01/2024

Home phone: (000) 000-0000

Office phone: 0 - Ext

Other phone: 0 -

Home email address: 403a@rogservices.com

Office email address:

Other email address:

Send email confirmation to: None

Security Question

Security Question 1: What is your mother's maiden name? [Answer 1](#)

Answer 1: Smith

Security Question 2: What city did you grow up in? [Answer 2](#)

Answer 2: Dallas

Investment Elections

403b Pretax Deferral [Edit](#)

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

The Vanguard Group : \$50.00

403b Roth Deferral [Edit](#)

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

The Vanguard Group : \$50.00

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

SUBMIT

9. 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](#).

[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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