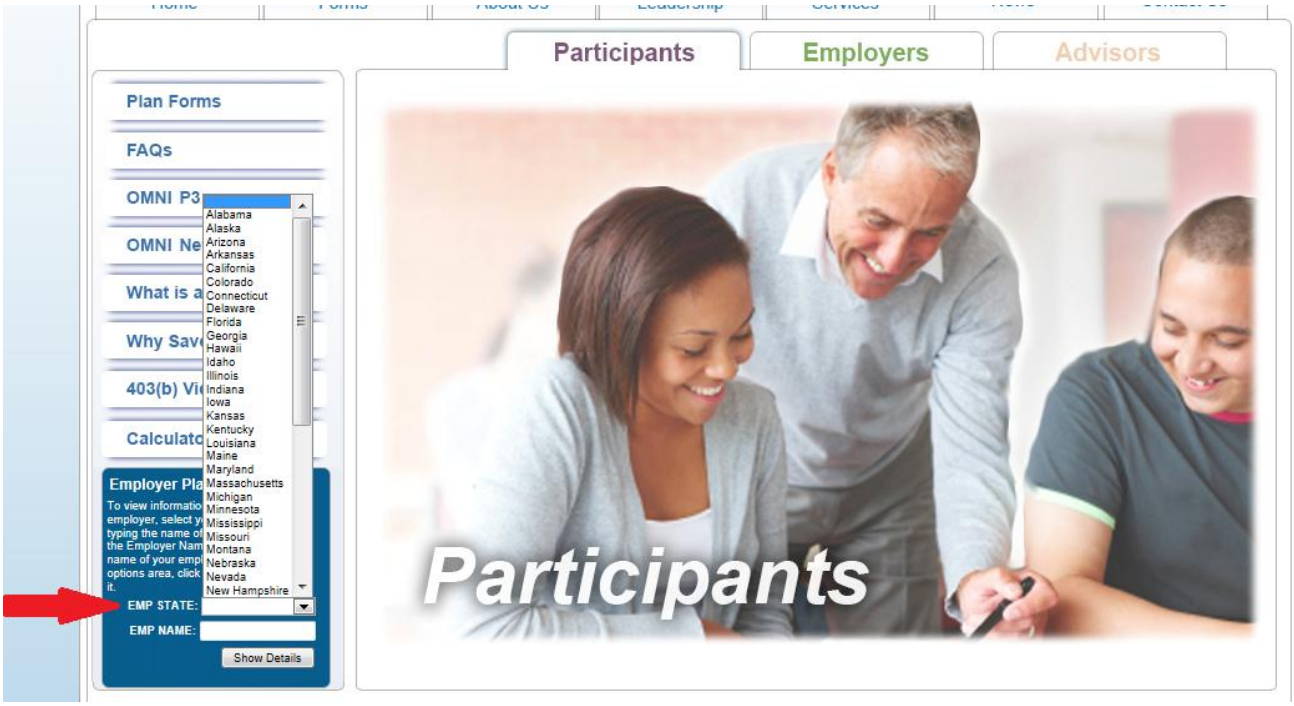
Organization Page

Organization specific plan information is available on OMNI's website at www.omni403b.com. This information can be viewed by following the steps below:

Go to OMNI's website at www.omni403b.com and select the purple button labeled "Participants":



Next, in the lower left-hand corner in the blue box select the Employer's State:



On the same page, in the lower left-hand corner begin entering the Employer Name. Note that when you begin typing the name, a dropdown box will appear where you can select the correct name.



You have now reached the Organization Page where you will find the following information:

1. Plan Features – This section outlines what is or is not permitted within the plan based on the organization's current plan document.
2. Participating Service Providers – This section identifies those service providers that employees are allowed to make contributions to.
3. Salary Reduction Agreement (SRA) – This section is where employees can submit or print an SRA form to start, stop or make a change to their contribution.
4. Service Provider Transactions – This section is where you will find the forms needed to initiate a transaction such as a distribution or loan.

