

403 (B) Plan

First step - Open an Account

Choose one of the four providers below and set up an account. The choice of the provider is yours to make. People choose their provider from a variety of factors including fees, ability to contact company representatives, ease of sign-ups, prior relationship, etc.

AXA Equitable

Contact Julie Moriarty, CLU, RICP (Julie.moriarty@axa-advisors.com/ 314-277-9447) or Kyle Koprowitz (kyle.koprowitz@equitable.com/ 217-679-1737) to set up an account.

Valic/AIG

[Contact a rep at this link to set up an account.](#)

[403b information](#)

Fidelity

Sign up for an account using the steps on the Fidelity on-line enrollment form. The sign-up site is at <http://www.netbenefits.com/ready2enroll>. Click enroll today to begin the process. Make sure you use **plan ID 54177** under new plan ID, the site defaults to a plan ID for individuals without an employer enrolled.

Horace Mann

Contact Mike Roman (mike.roman@horacemann.com) to set up an account.

Second step - Complete the Salary Reduction Agreement (SRA)

This website gives you options on how to complete this form.

<https://www.omni403b.com/SRA/Landing/4037201>

All SRA questions are to be sent to OMNI. Their contact information is on the SRA agreement.

457 (b) Plan (Roth option available as well)

First step - Open an Account

The district has one provider for 457(b) plan.

Valic/AIG

Online: Go to my.valic.com/onlineenrollment to set up an account. Our Access Code is 44528235. It is recommended to use a browser besides internet explorer for this sign-up.

Paper: This site will give you the option to print the form.
<https://www.omni403b.com/SRA/Landing/4037201>

Second step - Inform Payroll

Once this form is completed, you must send it to payroll via the following options. For security reasons, DO NOT send via email.

- Inter-office mail
- Drop off at the Administrative Building at 455 N. Woods Mill Rd.
- Mail through USPS