



We are excited to announce **U.S. OMNI & TSACG Compliance Services** as your **403(b) & 457(b) Third Party Plan Administrator!**

New Website Enhancements for your 403(b)/457(b) Plan

In partnership with your employer, U.S. OMNI & TSACG Compliance Services (OMNI/TSACG) has launched a new website to give you a more robust and user-friendly website that will permit you to easily start and change your contributions and submit transactions, a real time transaction tracker, and detailed specific information about your retirement account.

Starting or changing your contributions:

If you wish to start contributing or make a change to your current contributions, you will need to submit a **Salary Reduction Agreement (SRA)** form. Changes include: starting a new deduction, stopping an existing deduction, changing the amount of an existing deduction, or changing your investment provider.

The SRA form can be found in the “Employees” tab under “Start | Change Contributions” section of OMNI/TSACG’s website at www.omni403b.com. From there, you will select your employer state in the dropdown and enter your employer name. You have the option of printing out a form and faxing it to OMNI/TSACG or completing the form electronically on our secure website. We also offer a new SRA Express Shortened Online form to streamline the process by which new participants may begin making payroll deductions into a single investment account. It is suggested that you complete the electronic SRA form to expedite your request.



OMNI/TSACG’s services include the review and approval of all 403(b) & 457(b) transactions, and implementation of Salary Reduction Agreement (SRA) forms.

OMNI/TSACG is available from 4:30 a.m. to 5:00 p.m. Monday - Friday PST to assist with any questions you may have.

OMNI/TSACG’s call center representatives can be reached at:

1-877-544-OMNI (6664)

www.omni403b.com

TRANSACTIONS



Refer to the instructions on the following pages to submit an SRA or any of the transactions below.

*Transactions permitted by plan may vary

- > Distributions (including distributions due to age, death, disability, separation from service, and domestic relations orders).
- > Exchanges/Transfers/Rollovers of 403(b) funds between vendors or 403(b) plans
- > Hardship Withdrawals
- > Loans
- > Purchase of Service Credits
- > Qualified Domestic Relations Orders (QDRO)





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

1

> Employees > Employers > Advisors

- > Start | Change Contributions
- > Transaction Forms
- > **Your Plan Page**
- > Education
- > Employee FAQs

The IRS has rec 2020 Maximum Contribution (M and 457 plans.

Go to OMNI/TSACG's website at **www.omni403b.com** and select "Your Plan Page" under the "Employees" tab

2

Select your Organization:

Select Employer State

- AL
- AK
- AZ**
- AR
- CA
- CO
- CT
- DC
- DE
- FL
- GA

Employer Name

3

Select your Organization:

AZ

pa

- Palo Verde Elementary School Dist. 49
- Palominas Elementary Dist.

Next to Employer State enter the **Employer Name**. Begin typing the name, a dropdown box will appear, and you can select your organization's name.





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Below is a sample of an employer's specific plan page on www.omni403b.com:

The screenshot shows the Omni403b.com website interface. At the top, there's a navigation bar with 'Employees', 'Employers', and 'Advisors'. Below this, the 'Plan Detail' section is active, showing 'Plan Details for Your District Name' with tabs for '403(b)' and '457(b)'. The '403(b)' tab is selected. The page displays the 'Current Status: Active' and a list of 'Participating Investment Providers' with various investment options like Fixed Annuity, Variable Annuity, and Investment Advisory Service. A sidebar on the right contains icons for 'Start | Change Contributions', 'Transaction Forms', 'Universal Availability', 'Catch Up Contribution', and 'More Employee Information'. The main content area is divided into 'Plan Features' and 'Service Based Catch-up' sections, detailing eligibility, contributions, loans, and distributions.

PLAN DETAILS

403(b)

- 1. Salary Reduction Agreement (SRA)** – You can submit an on-line SRA form to start, stop or make a change to your contribution. You must already have an account established with your selected investment provider before submitting an SRA.
- 2. Participating Investment Providers** – Add or open an account choosing from the investment providers that have been approved in your plan.
- 3. Plan Transactions** – You'll find the forms needed to initiate transactions such as a distribution, hardship or loan.
- 4. Plan Features** – The Plan Features can be found below the list of Investment Providers. This section will outline what is or is not permitted within the plan, in accordance with the current plan document.

➡ To access **457(b) Plan Details** click on **457(b) Plan tab**.



Our call center is available Monday through Friday from 4:30 AM to 5:00 PM PST, with bilingual (Spanish) Customer Service Representatives available to assist during those hours.

1-877-544-OMNI (6664)

<https://omni403b.com>

U.S. OMNI & TSACG
Compliance Services
A DAYBRIGHT FINANCIAL COMPANY

