

We are excited to announce **U.S. OMNI** as our **403(b) Third Party Plan Administrator!**

In partnership with **Amherst Exempted Village SD**, OMNI will ensure that the plan sponsor, the participants, each of the investment providers and their agents adhere to the many compliance regulations mandated by the Internal Revenue Service.

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 "Forms" section of OMNI's website at www.omni403b.com. You have the option of printing out a form and faxing it to OMNI or completing the form electronically on their secure website. It is suggested that you complete the electronic SRA form to expedite your request.



OMNI's services include the review and approval of all 403(b) transactions, and implementation of Salary Reduction Agreement (SRA) forms.

OMNI is available from 7:30am to 8:00pm Monday - Friday EST to assist with any questions you may have.

OMNI'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.

- > 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)



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



OMNI Online™ Secure Portal

User: Password: LOGIN

Participants Employers Advisors

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



OMNI Online™ Secure Portal

User: Password: LOGIN

Home Forms

Plan Forms
FAQs
OMNI P3
OMNI Newsletter
What is a 403(b) Plan?
Why Save with 403(b)
403(b) Videos
Calculators

Employer Plan Info.
To view information specific to your employer, select your state then begin typing the name of your employer into the Employer Name field. When the name of your employer appears in the options area, click on its name to select it.

EMP STATE: **Alabama**
EMP NAME: Alabama
Alaska
Arkansas
California
Colorado
Connecticut
Delaware
Florida
Georgia
Hawaii

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



OMNI Online™ Secure Portal

User: Password: LOGIN

Home Forms

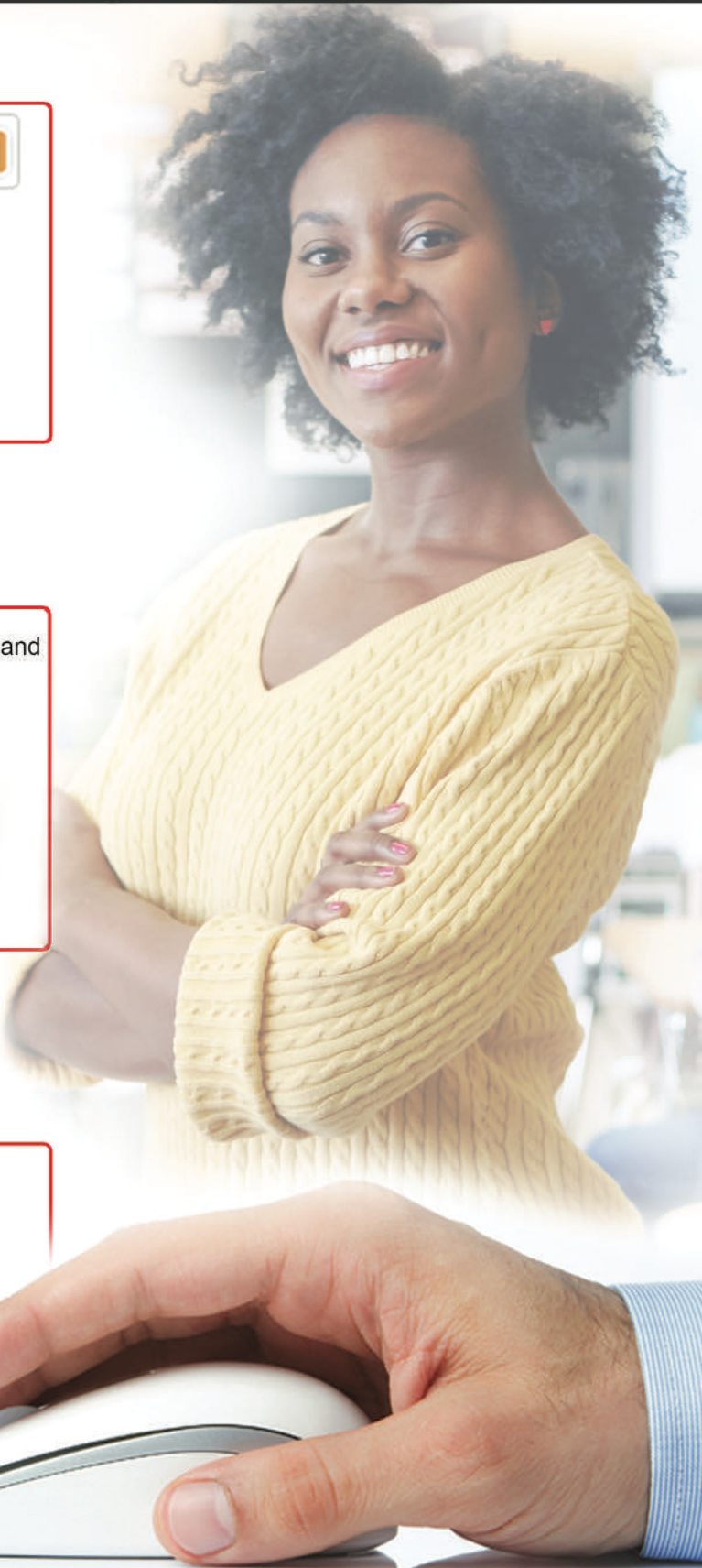
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EMP STATE: New York
EMP NAME: William Floyd UFSD
Williamson CS

Below Employer State enter the **Employer Name**

Begin typing the name, a dropdown box will appear and you can select your organization's name.



You have now reached the Amherst Exempted Village School District webpage where you will find the following information:



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 service provider before submitting an SRA.
- 2. Participating Service Providers** – Add or open an account choosing from the investment service 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** – Click on Plan Features in the lower right hand corner. This will bring up another window that displays what is or is not permitted within the plan based on your current plan document.



Plan Features

Eligible Employees

All Employees

Employer Non-Elective Contributions

Available

Loans

Available for qualified applicants

Financial Hardship Distribution

Available for qualified applicants

Transfers Into Plan

(A transfer of assets from one employer's 403(b) plan to another)

Available

Transfers Out of Plan

(A transfer of assets from one employer's 403(b) plan to another)

Available

< back

Rollover Contributions (A contribution of a distribution from another plan (i.e. 401(k), 457, IRA))
Please call OMNI to inquire.

ROTH 403(b)
Not Available

Contract Exchanges (a change of investment within a 403(b) plan)
Available. Please note that a new investment provider must be participating in your Employer's 403(b) plan. A list of your Employer's participating providers can be found under the *Participating Service Providers* section.

Distributions (i.e. Separation from Service, Attainment of 59 ½ years of age, Permanent Disability, or Death)
Available

APPROVED 403(b) PROVIDERS

- AIG Retirement Services (formerly VALIC)
- American General Life
- AXA Equitable Life Insurance Company
- FTJ Fundchoice, Inc
- Great American Insurance Group
- GWN / Employee Deposit Acct

- Horace Mann Life Ins. Co.
- MetLife
- National Life Group (LSW)
- Pacific Life Insurance Company
- Security Benefit
- Voya Financial (VRIAC)