

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

In partnership with **LEARN Regional Educational Service Center**, 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 “Employees” tab under “Start | Change Contributions” section of OMNI’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 or completing the form electronically on their secure website. OMNI also now offers 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’s services include the review and approval of all 403(b) & 457(b) transactions, and implementation of Salary Reduction Agreement (SRA) forms.

OMNI is available from 7:30 am to 8:00 pm 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



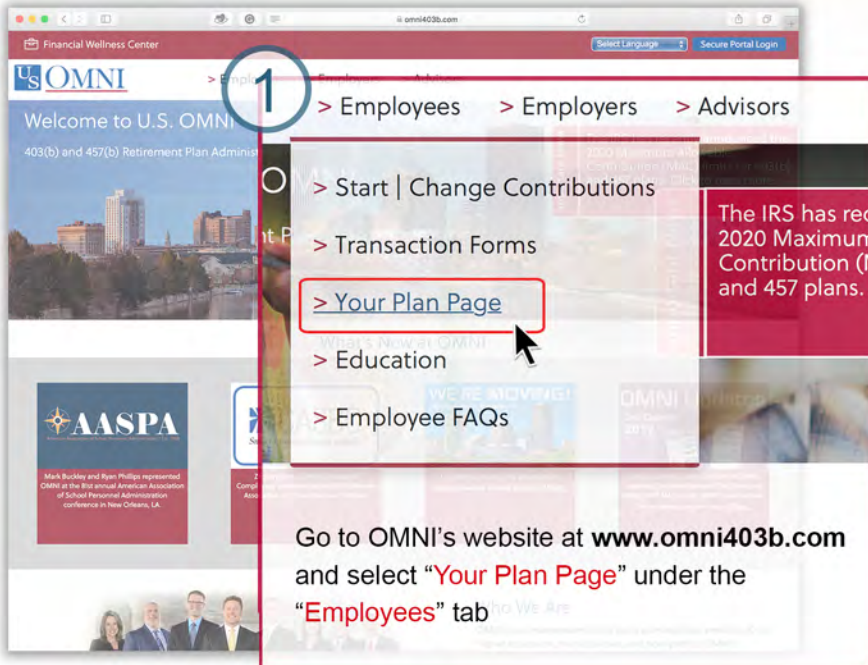
Refer to the instructions on the following pages to submit an SRA or any of the transactions below.

*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)



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



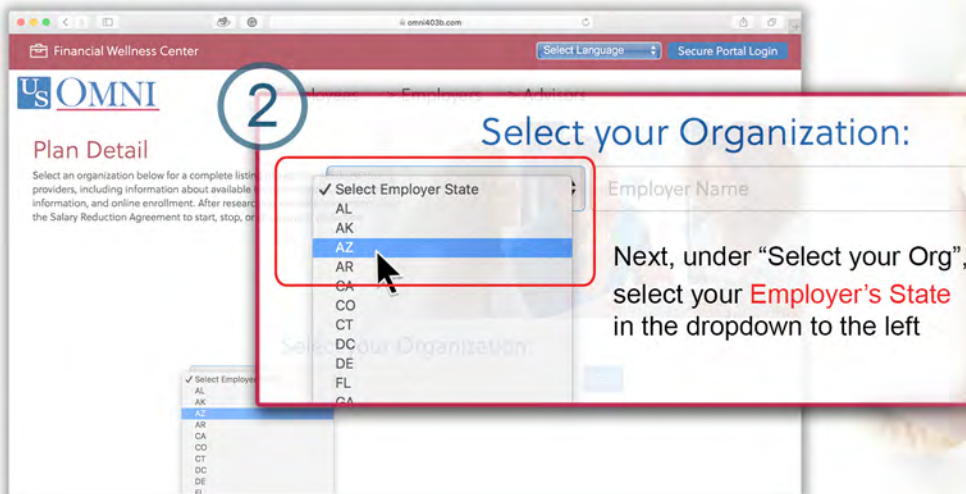
1

> 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's website at www.omni403b.com and select "Your Plan Page" under the "Employees" tab



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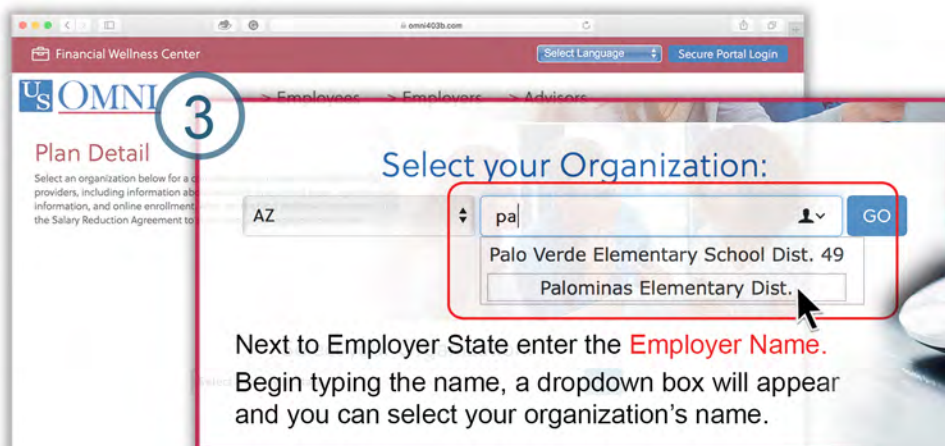
Select your Organization:

Select Employer State

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

Employer Name

Next, under "Select your Org", select your **Employer's State** in the dropdown to the left



3

Select your Organization:

AZ

pa | GO

- 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.



You have now reached the **LEARN Regional Educational Service Center** webpage where you will find the following information:

The screenshot shows the OMNI Financial Wellness Center interface. At the top, there are navigation links for Employees, Employers, and Advisors. The main heading is "Plan Detail". Below this, there is a section for "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 as "Active" and lists participating investment providers with various icons for investment types like Fixed Annuity, Variable Annuity, etc. There are also sections for "Plan Features" and a sidebar with icons for "Start | Change Contributions", "Transaction Forms", "Universal Availability", "Catch Up Contribution", and "More Employee 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 investment provider before submitting an SRA.
- 2. Participating Investment 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** – Find your Plan Features below the listed Participating Investment Providers. Your Plan Features contains what is or is not permitted within the plan based on your current plan document.

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



APPROVED 403(b) PROVIDERS

APPROVED 457(b) PROVIDERS

AIG Retirement Services (formerly VALIC)
 Ameriprise Financial/RiverSource
 Brighthouse Life Ins (MetLife CT/Travelers)
 Equitable (formerly AXA)
 Lincoln Investment Planning - **Coming Soon!**
 ROTH - AIG Retirement Services (formerly VALIC) - **Coming Soon!**
 ROTH - Brighthouse Life Ins (MetLife CT/Travelers) - **Coming Soon!**
 ROTH - Equitable (formerly AXA) - **Coming Soon!**
 ROTH - Lincoln Investment - **Coming Soon!**
 ROTH - Vanguard Fiduciary Trust Co. - **Coming Soon!**
 ROTH - Voya Financial (VRIAC) - **Coming Soon!**
 Vaguard Fiduciary Trust Co. - **Coming Soon!**
 Voya Financial (VRIAC)

AIG Retirement Services (formerly VALIC) - 457 - **Coming Soon!**
 Connecticut State Def Comp Plan - 457
 Equitable (formerly AXA) - 457 - **Coming Soon!**
 Lincoln Investment Planning - 457 - **Coming Soon!**
 ROTH - Connecticut State Def Comp Plan - 457
 Voya Financial (VRIAC) - 457 - **Coming Soon!**