Millard Public Schools
Business Services

Memo

To: 403b & 457 Plan Participants

From: Chris Hughes, Accounting Manager

Date: 06/25/2015

Re: Third Party Administrator (TPA)

Effective July 1, 2014, Omni Group became the district's Third Party Administrator for our 403(b) and 457 Retirement Plans. Omni is a leading 403(b)/457 Plan Administrator and ensures that the district, its employee participants, and each of our investment providers and their agents adhere to the many compliance regulations issued by the IRS.

It is necessary to contact Omni for all your 403b/457 needs. Human Resources or Payroll will not be able to process any changes to your plan.

You may contact Omni by visiting their website at www.omni403b.com or by phone at (877) 544-6664. I have attached instructions on use of their website.

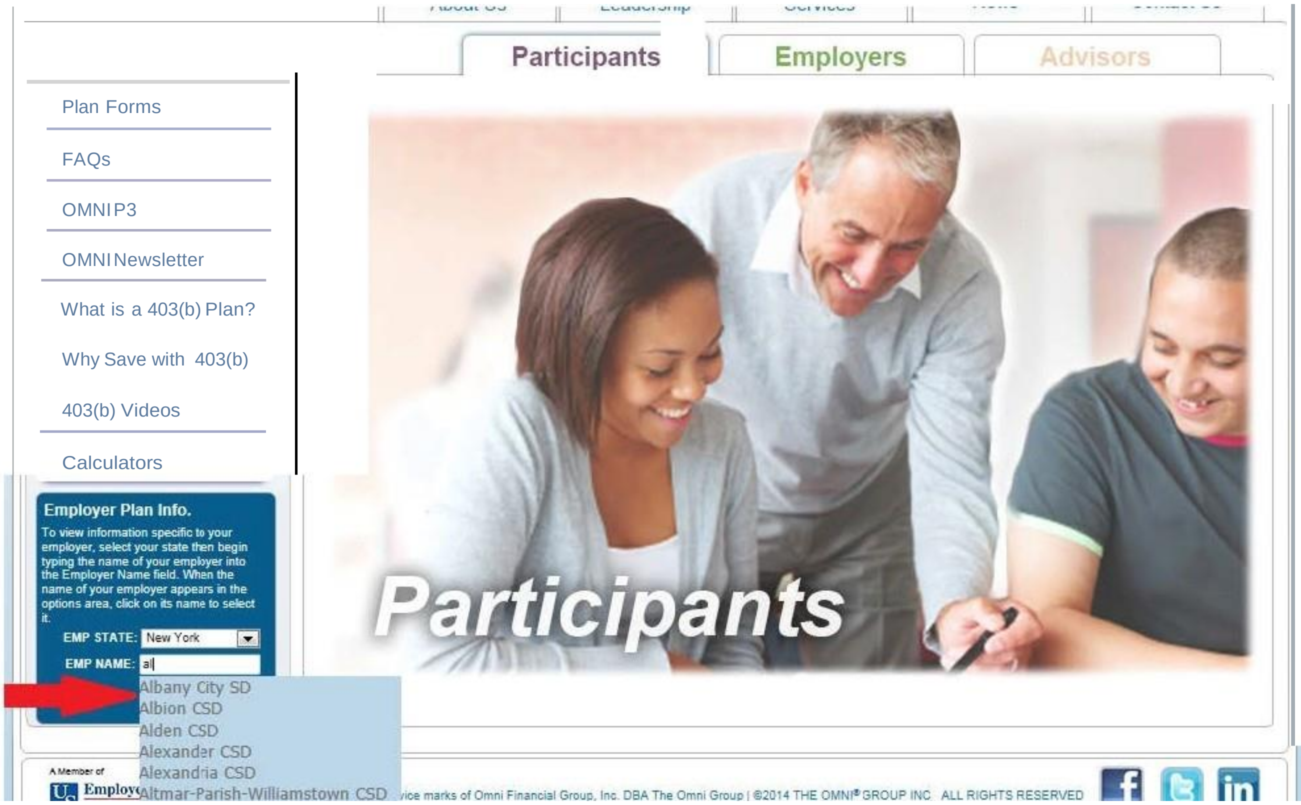
Organization Page

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. **Participating Service Providers** – This section identifies those service providers that employees are allowed to make contributions to.
2. **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.
3. **Plan Transactions** – This section is where you will find the forms needed to initiate a transaction such as a distribution or loan.

(Note: Information specific to the 457 Plan can be found by scrolling to the bottom of the page.)

Plan Details Millard Public Schools, Omaha NE

403(b) Plan Details:

Current Plan Status: Active

Participating Service Providers

Listed below are the Service Providers which currently participate in your organization's plan.

Service Providers with a double asterisk notation (**) are not authorized to accept new accounts under your employer's plan. Please contact OMNI® with any questions.

Where available, hyperlinks to the provider's website have been provided for your convenience.

Agent Info Available Click icon next to fund name for details.

Online Enrollment Available Click icon next to fund name for details.

- Ameriprise Financial Services, Inc.
- Ameritas Variable Life Co. **
- Aspire Financial Services
- AXA Equitable Life Insurance Company
- Commonwealth Annuity & Life Ins Co
- Fidelity Management Trust Co.
- First Investors Corporation
- Great American Insurance Group
- Horace Mann Life Ins. Co.
- Kansas City Life Insurance Company
- Lincoln National
- Mass Mutual VA
- MetLife
- Midland National Life Insurance
- Oppenheimer Shareholder Svcs.
- Putnam Investments
- ROTH - Aspire
- ROTH - AXA Equitable
- ROTH - First Investors
- ROTH - Horace Mann Life Ins. Co

Forms

Salary Reduction Agreement (SRA):

- Salary Reduction Agreement - Online
- Salary Reduction Agreement - PDF

Service Based Catch-Up Request:

- Online Request Form
- Downloadable PDF Version

Plan Transactions:

For assistance determining the proper service provider transaction form to submit for your situation, please review our Transaction Instructions *page for more information*

- Death Claim
- Disability
- Distribution
- Exchange
- Hardship
- Loan
- QDRO
- Rollover
- Service Credit
- Transfer