

# Memo

**To:** 403b & 457 Plan Participants  
**From:** Chris Hughes, Accounting Manager  
**Date:** 06/25/2015  
**Re:** Third Party Administrator (TPA)

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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](http://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](http://www.omni403b.com). This information can be viewed by following the steps below:

Go to OMNI's website at [www.omni403b.com](http://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.

The screenshot shows a website interface with three tabs: "Participants" (highlighted in green), "Employers", and "Advisors". Below the tabs is a large image of three people (two women and one man) looking at a document together, with the word "Participants" overlaid in large white text. On the left side, there is a navigation menu with links: "Plan Forms", "FAQs", "OMNIP3", "OMNI Newsletter", "What is a 403(b) Plan?", "Why Save with 403(b)", "403(b) Videos", and "Calculators". Below the menu is a section titled "Employer Plan Info." with instructions: "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." Below the instructions are two input fields: "EMP STATE:" with a dropdown menu set to "New York", and "EMP NAME:" with the text "al" entered. A red arrow points to the dropdown menu that is open, showing a list of employer names: "Albany City SD", "Albion CSD", "Alden CSD", "Alexander CSD", "Alexandria CSD", and "Altmar-Parish-Williamstown CSD". At the bottom of the page, there is a footer with the text "A Member of U.S. Employment" and "©2014 THE OMNI® GROUP INC. ALL RIGHTS RESERVED", along with social media icons for Facebook, Twitter, and LinkedIn.

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](#)