

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

In partnership with **Lancaster School District** OMNI will ensure that the plan sponsor, the participants, each of our 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 service provider.

The SRA form can be found in the "Forms" section of OMNI's website at [www.omni403b.com](http://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) & 457(b) transactions, and implementation of Salary Reduction Agreement (SRA) forms.

**OMNI** is available from 6:00am to 5:00pm Monday - Friday PST 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](http://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 distributions
- > Loans
- > Purchase of Service Credits
- > Qualified Domestic Relations Order



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:

OMNI Online™ Secure Portal

User: \_\_\_\_\_ Password: \_\_\_\_\_ LOGIN

**Participants** Employers Advisors

Go to OMNI's website at [www.omni403b.com](http://www.omni403b.com) and select the purple button labeled "Participants":

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 NA:  Alaska  
 Arizona  
 Arkansas  
 California  
 Colorado  
 Connecticut  
 Delaware  
 Florida  
 Georgia  
 Hawaii

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

Employer Plan Info.

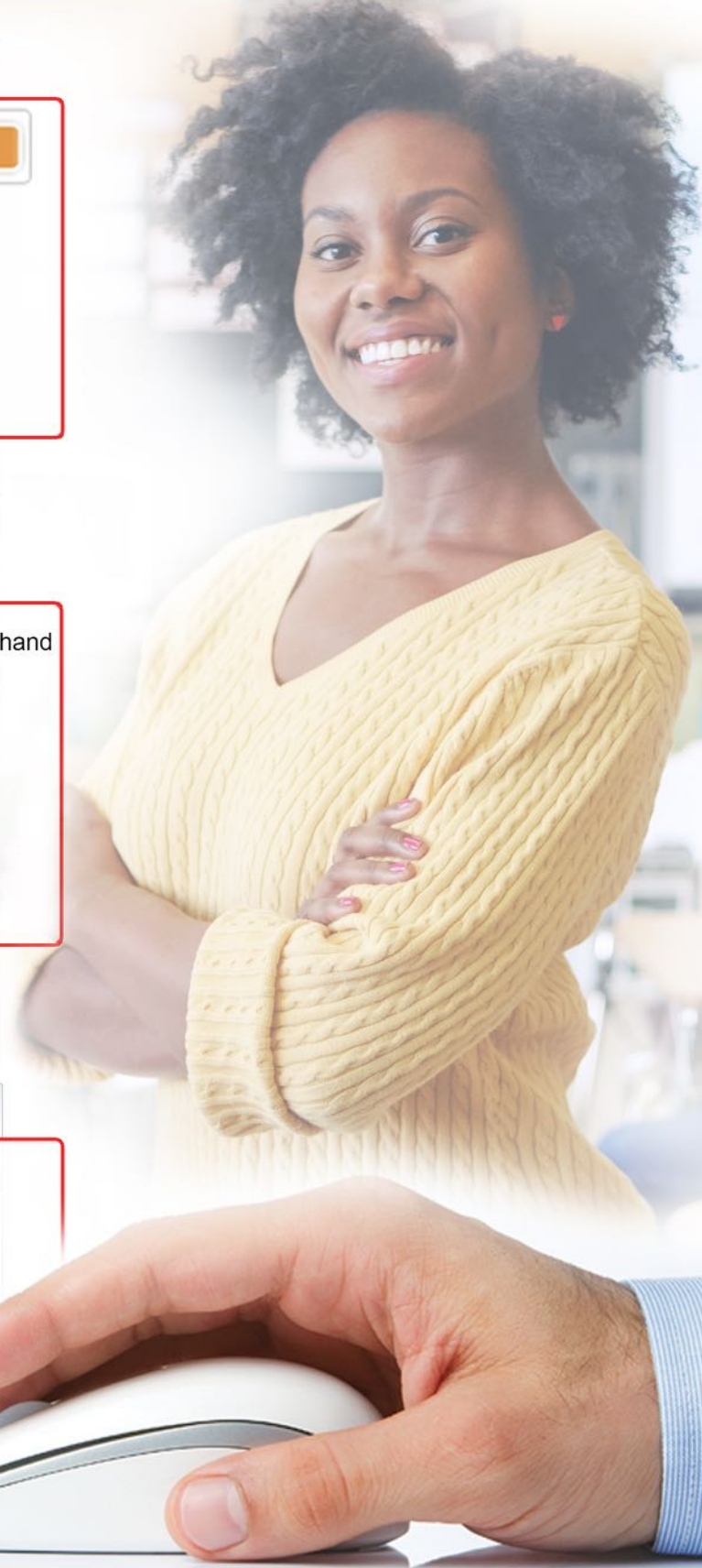
To view information specific to your employer, select your state then begin typing the name of your employer into the Employer Name field. When the name of your employer appears in the options area, click on its name to select it.

EMP STATE:

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 Lancaster 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.

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



### Plan Features

<p><b>Eligible Employees</b> All employees, excluding substitutes</p> <p><b>Employer Non-Elective Contributions</b> Available</p> <p><b>Loans</b> Available for qualified applicants</p> <p><b>Financial Hardship Distribution</b> Available for qualified applicants</p> <p><b>Transfers Into Plan</b> (A transfer of assets from one employer's 403(b) plan to another) Available</p> <p><b>Transfers Out of Plan</b> (A transfer of assets from one employer's 403(b) plan to another) Available</p> <p><a href="#">&lt; back</a></p>	<p><b>Rollover Contributions</b> (A contribution of a distribution from another plan (i.e. 401(k), 457, IRA)) Please call OMNI to inquire.</p> <p><b>ROTH 403(b)</b> Available - See provider list on our website</p> <p><b>Contract Exchanges</b> (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 <i>Participating Service Providers</i> section.</p> <p><b>Distributions</b> (i.e. Separation from Service, Attainment of 59 ½ years of age, Permanent Disability, or Death) Available</p>
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New accounts for 403(b) & 457(b) may be opened with following approved service providers

### 403(B)

- > American Fidelity Assurance Co.
- > American United Life
- > Americo Financial Life/Annuity
- > Ameriprise Financial Services, Inc.
- > AXA Equitable Life Insurance Co.
- > California Teacher Association (CTA)
- > CalSTRS Pension 2 (VOYA)
- > Fiduciary Trust Intl.-Franklin Templeton
- > Foresters Financial (First Investors)
- > Foresters Financial (FI) ROTH 403B
- > FTJ Fundchoice, Inc.
- > Great American Insurance Group
- > GWN Securities ROTH 403B
- > Horace Mann Life Ins. Co.
- > Horace Mann ROTH 403B
- > Industrial Alliance – (Sec. Ben.)
- > MetLife
- > Midland National Life Insurance
- > National Life Group (LSW)
- > National Life Group ROTH
- > Nationwide/Schools First (FCU)
- > North American Company
- > New York Life Ins. & Annuity Corp.
- > Oppenheimer Shareholder Svcs.

### 457(B)

- > Security Benefit

- > Pacific Life Insurance Company
- > Paul Revere Variable Annuity Ins.
- > PFS Investments
- > Plan Member Services ROTH 403B
- > RSG Securities ROTH 403B
- > Security Benefit
- > Thrivent Financial for Lutherans
- > VALIC
- > Vanguard Fiduciary Trust Co.
- > Voya Financial Trust Co.
- > Voya Financial
- > Waddell & Reed, Inc.