

## ***403(b) or 457(b) Plan Enrollment and Participation Instructions***

### ***Getting Started***

- ❑ Via the Internet go to [www.envoyplanservices.com](http://www.envoyplanservices.com)
- ❑ Click onto Client Center; then Click onto your State, County and Employer.
- ❑ You are now on your Employer's home page on the Envoy website.
  - **Plan Providers** – A complete list of Approved Providers currently available in the Plan is listed on the Employer's home page.
  - **Forms** – On the Employer's home page forms are provided for your participation on the Plan, such as Salary Reduction Agreement (to initiate or change payroll deductions), Plan Highlights, Transaction Information Form, and more.
  - **Educational Video** is provided for your viewing.

**IMPORTANT NOTE: IF YOU HAVE A 403(b) AND/OR 457(b) PLAN ACCOUNT WITH A PREVIOUS EMPLOYER, YOU MUST ESTABLISH A NEW ACCOUNT WITH YOUR PROVIDER TO ENROLL IN THIS PLAN. YOUR SALARY DEFERRAL CONTRIBUTIONS IN THIS EMPLOYER'S 403(b) PLAN AND 457(b) PLAN CANNOT BE INVESTED IN THE 403(b) PLAN AND 457(b) PLAN OF A PREVIOUS EMPLOYER.**

### ***Step 1: Enrolling with a 403(b) or 457(b) Provider***

- ❑ Locate the provider of your choice from the list on your Employer's home page.
- ❑ Contact information is listed for each approved provider.
- ❑ Contact the provider directly to request enrollment forms and instructions.
- ❑ Work directly with the provider to complete their enrollment process. (*Envoy Plan Services will not accept Provider enrollment forms*).

### ***Step 2: Establish Salary Reduction Agreement (SRA)***

- ❑ After you have established your 403(b) and/or 457(b) account, you will need to submit a completed 403(b) and/or 457(b) SRA to begin your payroll deduction contributions.

**Online:** To submit an online SRA go to Envoy's website at [www.envoyplanservices.com](http://www.envoyplanservices.com) and click on the Online SRA button at the top right of the page.

- a. This user-friendly system will guide you through the process of submitting a new Salary Reduction Agreement or amending an existing Salary Reduction Agreement.

**Paper:** See the Getting Started section above for instructions to obtain a paper SRA form

### ***Instructions for Submission of Distributions/Transactions:***

- ❑ Transactions for the Plan include: loans, transfers, rollovers, contract exchanges, QDROs, and all distributions.
- ❑ All transactions must be sent to Envoy for approval prior to submission to your provider for processing.
- ❑ To submit a transaction request to Envoy for approval follow the steps below:

**Online:**

- a. Contact your provider and request their specific paperwork.
- b. Go to Envoy's website and obtain the Transaction Information Form, available on the Employer's home page.
- c. Go to Envoy's website at [www.envoyplanservices.com](http://www.envoyplanservices.com) and click on the Online Distributions button.
- d. This user-friendly system will guide you through a series of questions designed to help you obtain immediate approval certification. If your request is not eligible for immediate approval, the system will guide you through the process of submitting your distribution documents for further review.

**Paper:**

- a. Contact your provider and request their specific paperwork.
- b. Go to Envoy's website and obtain the Transaction Information Form, available on the Employer's home page.
- c. Complete and mail all of the paperwork to Envoy at the address below, or you can fax the paperwork toll free at 877-513-2272.

**ENVOY PLAN SERVICES, INC.**

**c/o TSACG**

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**(800) 248-8858 Toll Free Phone Number**

**(877) 513-2272 Toll Free Fax Number**

**Email us at: [info@envoyplanservices.com](mailto:info@envoyplanservices.com)**

**Website: [www.EnvoyPlanServices.com](http://www.EnvoyPlanServices.com)**