

403(b) Plan Enrollment and Participation Instructions

Getting Started

- ❑ Via the Internet go to 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.
 - **403(b) Plan Providers** – A complete list of Approved Providers currently available in the Plan is listed on the Employer's home page.
 - **Forms Tab** – A Forms tab is at the top of the home page. Clicking on this tab will provide you with Definitions, Enrollment Procedures, Plan Highlights, Salary Reduction Agreement (SRA), Transaction Request Form and Instructions.
 - Print hard copy paper forms you would like to use at this time; and read carefully!
 - Follow the submission instructions on the 2nd page of the SRA.
 - **Frequently Asked Questions** – A list of frequently asked questions and the responses to the questions is provided for your reference.
 - **Educational Videos** are 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 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) 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) account, you will need to submit a completed SRA to begin your payroll deduction contributions.

Online: To submit an online SRA go to Envoy's website at www.envoyplanservices.com and click on the red Login Button at the top right of the page.

- a. If this is your initial login, select "Create Participant Account." Select your State from the list and then enter your Employer name in the "Plan" field. Complete your personal information and click "Register."

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

Instructions for Submission of Transactions:

- ❑ Transactions for the Plan include: loans, transfers, rollovers, contract exchanges, 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. Go to Envoy's website at www.envoyplanservices.com and click on the red Login Button at the top right of the page
- b. If this is your initial login, select "Create Participant Account." Select your State from the list and then enter your Employer name in the "Plan" field. Complete your personal information and click "Register."

Paper:

- a. Contact your provider and request their specific paperwork.
- b. Go to Envoy's website and obtain the Transaction Request Form and Instructions (located from Envoy's website home page under Forms and Tools)
- 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 MidAmerica

402 South Kentucky Ave, Suite 500

Lakeland, FL 33801

(800) 248-8858 Toll Free Phone Number

(877) 513-2272 Toll Free Fax Number

Email us at: info@envoyplanservices.com

Website: www.EnvoyPlanServices.com