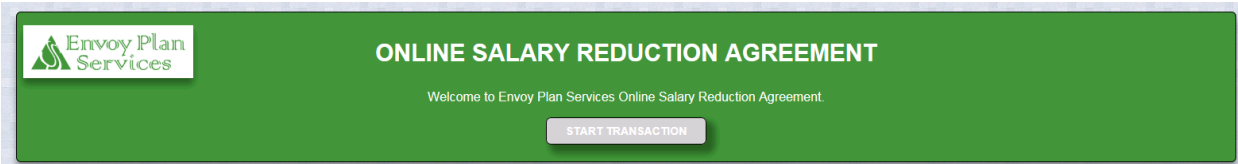


Online Salary Reduction Agreement Overview

Employees should review the information below to successfully utilize the online 403(b) Salary Reduction or 457(b) Participation Agreement process:

1. Before completing the online 403(b) Salary Reduction and 457(b) Participation Agreement process, you **MUST** have an account established with the 403(b) or 457(b) authorized Investment Provider of your choice.
2. Navigate to the secure website <https://EnvoyPlanServices.com>, and click the “Online SRA” button on the top right of the home page to access the “Online Salary Reduction Agreement” page.



3. **Note that the SRA information entered via the online system will supersede and replace all prior 403(b) and/or 457(b) elections including the amounts, investment providers, and effective dates. Any election(s) you want to continue must be reflected or the election will be stopped.**
4. Employer and Participant Information – If you have previously entered SRA information or Envoy has your demographic information archived in their system, most of your personal information will pre-populate. If your information is not currently in Envoy’s system, you will be able to add your record. Depending on the information displayed, be prepared to enter the following information:
 - Employer’s State
 - Employer’s Name
 - Employee’s Social Security Number
 - Employee’s Date of Birth
 - Employee’s Name, Address, and Telephone Number

Part 2: Employer Information

* Employer State * Employer

If you cannot find the employer's state or employer's name above, please contact the SRA Processing department at 800-248-8858 ext. 5402 to determine if the employer allows online Salary Reduction Agreements.

Part 3: Participant's Information

Social Security Number AND Date of Birth

Personal Information

* First Name
Middle Name
* Last Name
Hire Date
Employer Termination Date

Contact Information

* Address
* City
* State
* Zip Code
* Phone Number Ext
Email
* Alternate Email

* Has the participant terminated employment with this employer? No Yes

5. Salary Reduction Agreement Information – You have the ability to start, change, or stop contributions. If you want to maintain an existing contribution(s), you will need to enter the information for that contribution in addition to any other changes you are making. Be prepared to enter the following information:

- Effective Date of the contribution(s)
- The total dollar amount per pay period for all contributions
- The investment provider(s) to whom you would like to contribute
- The Plan type
- The amount of a previous contribution, if any
- The new amount of your contribution

Part 4: Salary Reduction Agreement Information

Salary Reduction Agreement Information

Effective Date

© Dollars

Total Per Pay Dollar Amount \$

Total Per Pay Amount above must match SRA Total below.

This SRA will supersede and replace all prior 403(b) and/or 457(b) elections including the amounts, investment providers, and effective date. Any contributions you want to continue must be re-entered or the deduction will be stopped.

403(b) Contributions

Investment Provider	Contract/ Account Number	Plan Type	Previous Amount	New Amount	
Select Investment Provider <input type="text"/>	<input type="text"/>		\$ 0.00	\$ 0.00	Remove
<input type="button" value="Add"/>					
403(b) Contributions Total					\$ 0.00

457(b) Contributions

Investment Provider	Contract/ Account Number	Plan Type	Previous Amount	New Amount	
Select Investment Provider <input type="text"/>	<input type="text"/>		\$ 0.00	\$ 0.00	Remove
<input type="button" value="Add"/>					
457(b) Contributions Total					\$ 0.00

* SRA Total \$ 0.00

* Must Equal Total Per Pay Amount

6. Salary Reduction Agreement Terms and Disclosures – Once you have clicked *Finished*, you will be asked to read and confirm that you have read the SRA terms. You will also be asked to acknowledge the SRA disclosures.

7. Submitting your SRA – After completing the terms and disclosures sections, you will be asked to confirm that you are not a robot, and then you can submit your SRA. Envoy will forward your contribution information to your employer, and you can print a copy of the SRA for your records. Providing your account(s) is established with your investment provider, no further action is required.

ONLINE SALARY REDUCTION AGREEMENT

Welcome to Envoy Plan Services Online Salary Reduction Agreement.

Your Salary Reduction Agreement (SRA) request has been received. Your SRA will be processed as soon as administratively possible based on your Employer's payroll processing schedule.

Click [here](#) to download your SRA forms.

Should you have any questions regarding the process, please contact Envoy's SRA Department at 800.248.8858 ext. 5402.