



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

In partnership with **Elmira City School District** OMNI will ensure that the district, the participants, and each of our investment providers and their agents adhere to the many compliance regulations mandated by the Internal Revenue Service.

OMNI's services include the review and approval of all 403(b) & 457(b) transactions, as well as the implementation of Salary Reduction Agreement (SRA) forms.

Making a change to your 403(b) or 457(b) benefit

If you wish to make a change to your 403(b) or 457(b) benefit 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. 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 is available from 7:30am to 8:00pm Monday - Friday EST 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

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



Specific plan information is available on OMNI's website at www.omni403b.com.
This information can be viewed by following the steps below:

Participants Employers Advisors

Go to OMNI's website at 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.

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

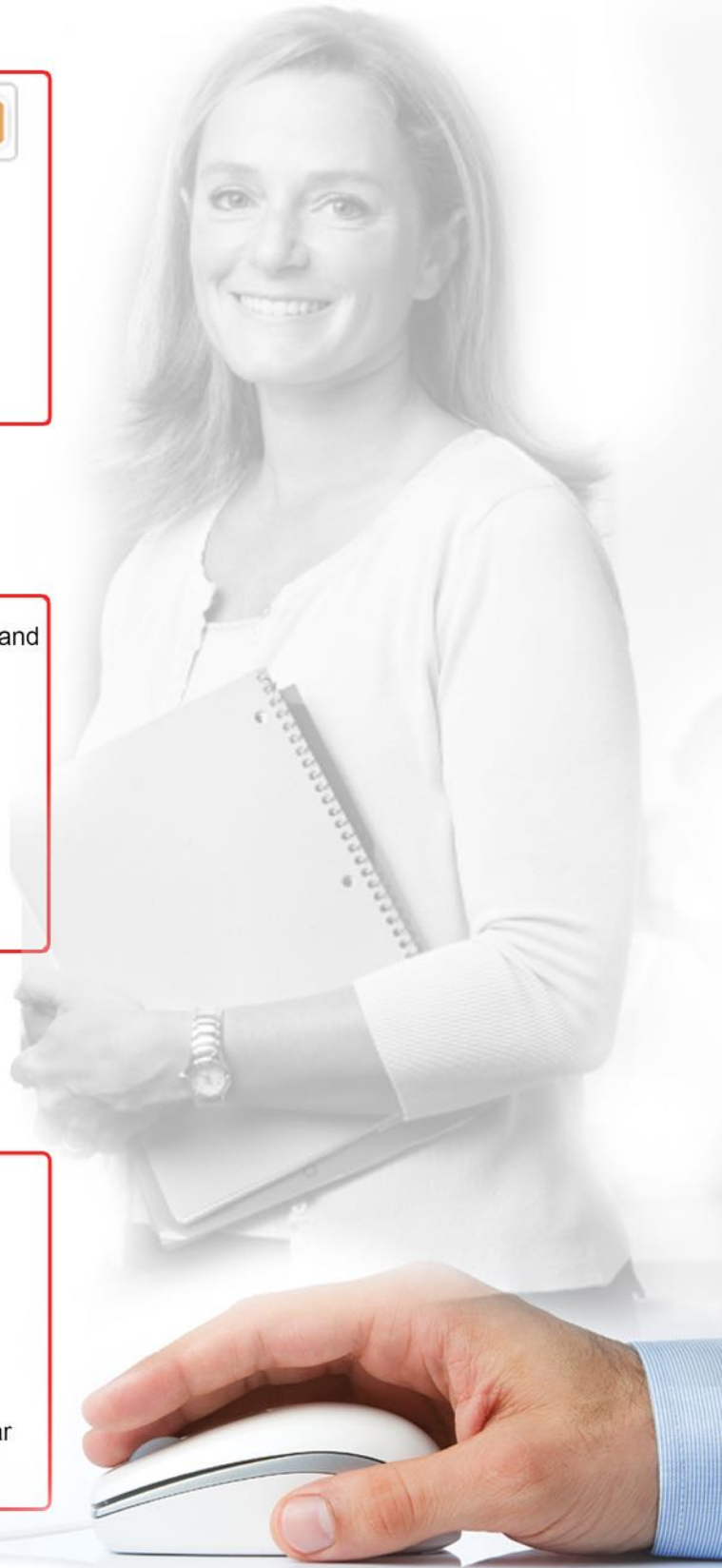
EMP STATE: Alabama
 Alaska
 Arizona
 Arkansas
 California
 Colorado
 Connecticut
 Delaware
 Florida
 Georgia
 Hawaii

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.

Below Employer State enter the **Employer Name.**

EMP STATE:
 EMP NAME:
 William Floyd UFSD
 Williamson CS

Begin typing the name, a dropdown box will appear and you can select your organization's name.





You have now reached the Elmira City 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 our 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>Eligible Employees All Employees</p> <p>Employer Non-Elective Contributions Available</p> <p>Loans Available for qualified applicants</p> <p>Financial Hardship Distribution Available for qualified applicants</p> <p>Transfers Into Plan (A transfer of assets from one employer's 403(b) plan to another) Available</p> <p>Transfers Out of Plan (A transfer of assets from one employer's 403(b) plan to another) Available</p> <p>< back</p>	<p>Rollover Contributions (A contribution of a distribution from another plan (i.e. 401(k), 457, IRA)) Please call OMNI to inquire.</p> <p>ROTH 403(b) Not Available</p> <p>Contract Exchanges (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>Distributions (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)

- Ameriprise Financial Services Inc.
- AXA Equitable Life Insurance Company
- Foresters Financial (First Investors)
- FTJ Fundchoice Inc.
- MetLife
- MetLife of CT (Travelers)
- NY Life Ins. & Annuity Corp.
- TIAA - CREF
- Voya Financial (Nat'l. NY)

The Following Service Providers are available for existing accounts only.

- Chemung Canal Trust Co.

457(B)

- New York State Deferred Comp Plan
- ROTH - NYS Deferred Comp Plan