

457(b) Plan Enrollment Instructions



These instructions are for creating and accessing a traditional 457(b) account and/or a Roth 457(b) account.

Traditional 457(b)

Selecting pre-tax contributions allows you to contribute a portion of your salary to a retirement savings account before taxes are taken out. The money invests tax-deferred, meaning you don't pay taxes on the contributions or earnings until you withdraw the funds.

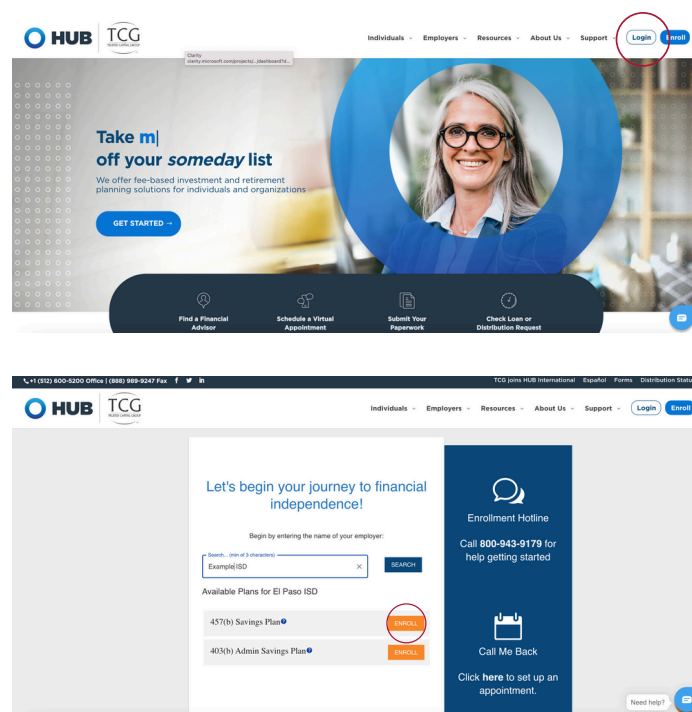
Roth 457(b)

Selecting Roth contributions allows you to contribute a portion of your salary to a retirement savings account after taxes are taken out. The interest and any earnings withdrawn from a Roth account are tax-free if the distribution is considered “qualified.”

Reminder

You can have both a traditional and a Roth 457(b)—and contribute to one or both at the same time—if allowed by your plan.

1. Go to www.tcgservices.com and click **Enroll**.



2. Type the name of your **Employer** in the search box and click **Enroll** on the **457(b) Savings Plan**.

3. Enter your **Social Security number** to continue.

If the website indicates that “a user name and password already exists,” then proceed with the following steps:

Enter your Social Security Number as the **username**, and your birthday in numerical digits (MMDDYYYY) as the **password**.

For example:

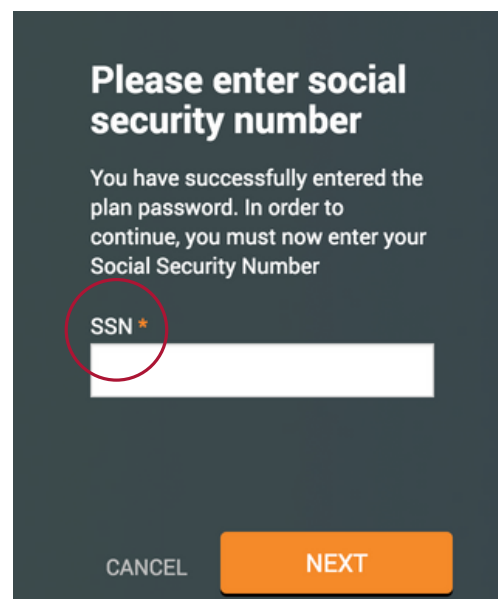
Social Security number: 123-45-6789

Birthday: 01/02/1980

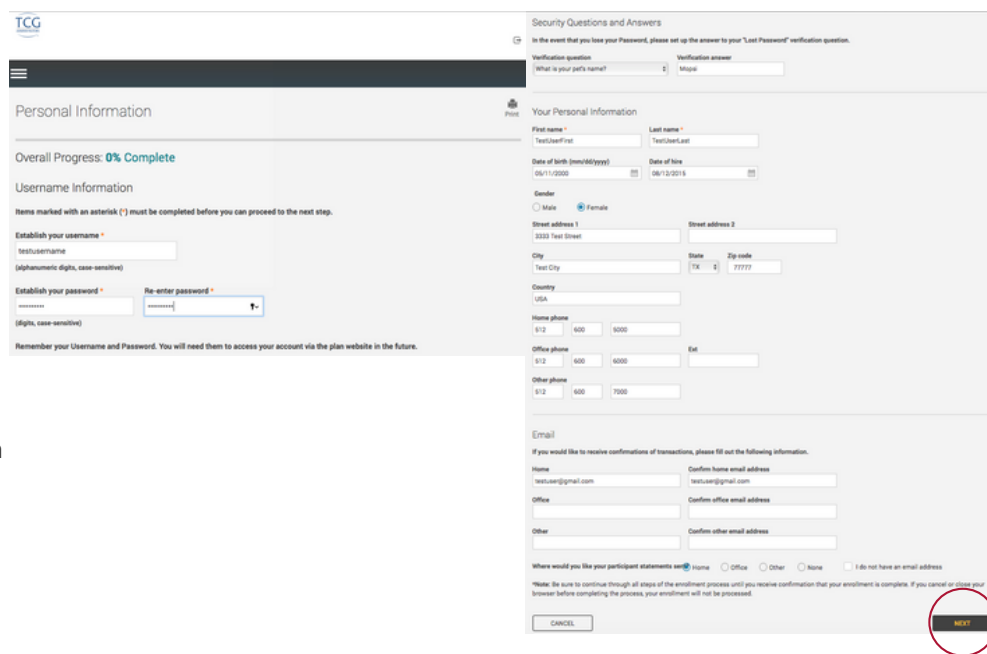
Username: 123456789

Password: 01021980

If you are still unable to login, please call **(800) 943-9179**

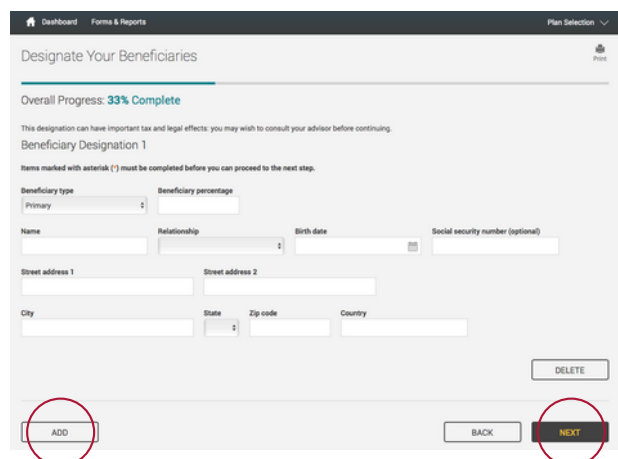


4. Create your Username and Password; enter all personal information; then click **NEXT**.



5. Designate your beneficiaries on this screen. After you insert your Primary beneficiary's information, click **ADD** to add additional beneficiaries.

Click **NEXT** when you are done.



6. Contributions

Make your selection from the drop down box—either the **Pre-Tax** or post-tax **Roth** contribution type.

Enter the contribution dollar amount per pay period. (If allowed by your district, you may select your funds by percentages.)

Click **NEXT**.

Please note that the contribution amount is the amount you want deducted from your paycheck **EVERY** pay period.

Dashboard Forms & Reports Plan Selection

Contributions

Overall Progress: **40% Complete**

Current Contribution Amounts

Last Web/VOL Contribution	Total
Pre-Tax Deferral	\$0.00 per pay period
Roth	\$0.00 per pay period

Change Contribution Amounts
Please enter a contribution percentage or dollar amount that your employer will deduct from your compensation each payroll period for deposit to your account.

> Rules and Criteria

Action	Contribution Type	Percent/Dollar	Current Contribution	New Contribution Rate
No change	Pre-Tax Deferral	Dollar	Not contributing	0.00 per pay period
No change	Roth	Dollar	Not contributing	0.00 per pay period

RESET BACK NEXT

7. Click **All Sources** to reveal the funds available.

Dashboard Forms & Reports Plan Selection

Select Investments

Overall Progress: **50% Complete**

The investment elections you enter below will be applied to all sources of contributions (including any employer contributions). Please note that once you have completed the enrollment process, you can always change your investment elections. For more information, please contact your plan administrator once you have completed the enrollment process.

I elect to invest all future contributions (including employee and employer contributions) as follows.

> Rules and Criteria

> All Sources

BACK NEXT

8. Here you will apply the dollar amount (or percentage) of your contribution to the investment(s) of your choice.

Note: The investments available to you will be plan-specific and may not match the screenshot provided in this guide.

Once you are satisfied with your choices and your total at the bottom of the page equals 100%, click **NEXT**.

I elect to invest all future contributions (including employee and employer contributions) as follows.

> Rules and Criteria

> All Sources

Investment	Current Elections	New Elections
RAMS Aggressive Growth	0.00%	0.00%
RAMS Capital Preservation	0.00%	0.00%
RAMS Conservative	0.00%	0.00%
RAMS Growth	0.00%	0.00%
RAMS Moderately Conservative	0.00%	0.00%
RAMS Signature Portfolio	0.00%	0.00%
DFA Continental Small	0.00%	0.00%
DFA Intl Small Cap Value	0.00%	0.00%
DFA Large Cap International	0.00%	0.00%
DFA US Large Company Portfolio	0.00%	0.00%
Vanguard Total Stock Index	0.00%	0.00%
DFA US Large Value	0.00%	0.00%
Vanguard Wellington	0.00%	0.00%
Blackrock Total Return Instl	0.00%	0.00%
Columbia Corporate Income Fund V	0.00%	0.00%
Met Life Stable Value Fund	0.00%	0.00%
Victory Emerging Markets Small Cap I	0.00%	0.00%
Victory Fund For Income	0.00%	0.00%
Goldman Sachs Commodity Strategy	0.00%	0.00%
DFA US Micro Cap	0.00%	0.00%
DFA US Small Company	0.00%	0.00%
DFA US Small Value	0.00%	0.00%
TOTAL	0.00%	0.00%

RESET TABLE

BACK NEXT

9. Review all entries. Make any changes using the Edit buttons


Click **SUBMIT** when you are satisfied.

Enrollment steps


Overall Progress: **65% Complete**

Almost Done! Confirm & Submit


If your enrollment information is correct, click below to submit your enrollment request.

Personal Information 


Username: Madu20457
First name: Jane
Last name: Doe
Middle name:
Street address 1: 23244 Mujeres Isle Dr
Street address 2:
City: Pasadena
State: CA
Zip code: 90493
Country:
Date of birth: 01/01/1990
Agent:
Home phone:
Office phone:
Other phone:
Home email address:
Office email address:
Other email address:
Send email confirmation to: None

Salary Deferral Elections 

Pre-tax contributions: Deduct \$100.00 each pay period.

Beneficiary Designations 


If you do not designate any beneficiaries, your account will be distributed in accordance to plan provisions in the event of your death.

Investment Elections 

All future contributions to the plan will be invested as follows:

- BlackRock Total Return Fund II: 40.00%
- TIAA CREF LifeStyle 2005: 30.00%
- Vanguard Life Strategy Conservative: 10.00%
- Vanguard Life Strategy Income: 20.00%

If your enrollment information is correct, click below to submit your enrollment request.

SUBMIT 

10. Well done! You are finished! Your six-digit Confirmation Number will be emailed to you.

Dashboard Forms & Reports

Enrollment steps

Overall Progress: **100% Complete**

🎉 Congratulations! Your Account has been Created. The confirmation number for this transaction is: 348162

You may access your account via the plan's website at any time using your Username and Password. If you elected to receive email confirmations, you will receive confirmation of your enrollment at the email address specified.

Reminders:


Your contribution may be cancelled if your Vendors and Products are not properly registered. To review your Product Registration, [click here](#).

11. From this **Dashboard** screen you can view the performance of your funds, change your contribution rate, manage your investments, etc.

Scroll down to see your chosen investments, fund ID, performance, paycheck deductions and balance.

(The two funds shown are examples only.)

Dashboard Manage Plan Performance Loans & Withdrawals Forms & Reports Plan Selection

My Dashboard 

Account Balance: \$0.00
\$0
Your Balance

Contribution Rate

Pre-tax: \$0
Roth: \$0

MANAGE INVESTMENTS **CHANGE CONTRIBUTION RATE**

My Portfolio

View: Overview | Performance model: 1 year

Investment Name	Fund ID	Performance	From My Paycheck	Balance
S&P 500 Large Company Portfolio	DFUSX	+1.1%	25%	\$0.00
Vanguard Total Stock Index	VTSAX	+0.6%	75%	\$0.00



TCG Administrators | 900 S Capital of Texas Hwy, Ste 350, Austin, TX 78746 | Office 800.943.9179 | Fax 888.989.9247 | www.tcgservices.com

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