

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.

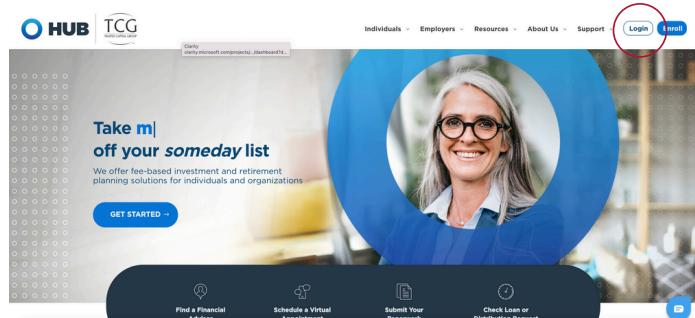
Roth 457(b)

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 The interest and any earnings withdrawn from a Roth account are tax-free if the distribution is considered "qualified."

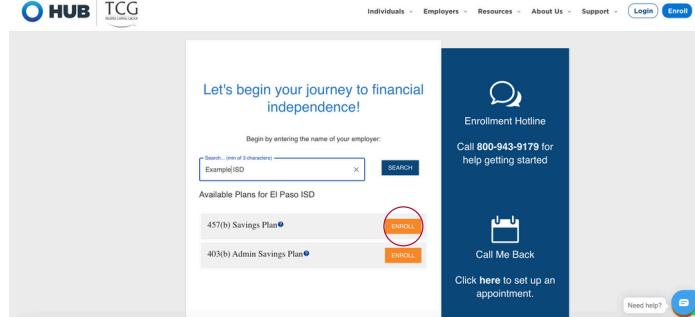
Reminder

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**

Please enter social security number

You have successfully entered the plan password. In order to continue, you must now enter your Social Security Number

SSN *

CANCEL **NEXT**

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.

Designate Your Beneficiaries

Overall Progress: 33% Complete

This designation can have important tax and legal effects: you may wish to consult your advisor before continuing.

Beneficiary Designation: 1

Items marked with asterisk (*) must be completed before you can proceed to the next step.

Beneficiary type: Primary Beneficiary percentage:

Name: Relationship: Birth date: Social security number (optional):

Street address 1: Street address 2:

City: State: Zip code: Country:

ADD **BACK** **NEXT**

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.**

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

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

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.

> Rules and Criteria

> All Sources

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

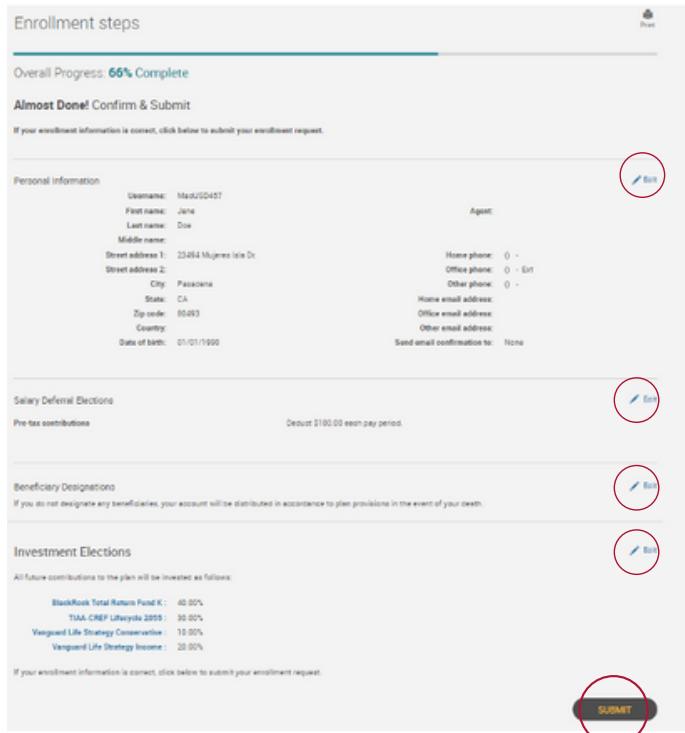
Note: The investments available to you will be plan-specific and may not match the screenshot provided in this guide.

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

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 Int'l 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 Y	0.00%	0.00%
MetLife 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%

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

Click **SUBMIT** when you are satisfied.



Enrollment steps

Overall Progress: **66% Complete**

Almost Done! Confirm & Submit

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

Personal Information

Username: MastJ/DAST
First name: Jane
Last name: Doe
Middle name:
Street address 1: 22454 Muyeres Lake Dr.
Street address 2:
City: Pasadena
State: CA
Zip code: 95493
Country:
Date of birth: 01/01/1990

Home phone: 0 -
Office phone: 0 - Ext.
Other phone: 0 -
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

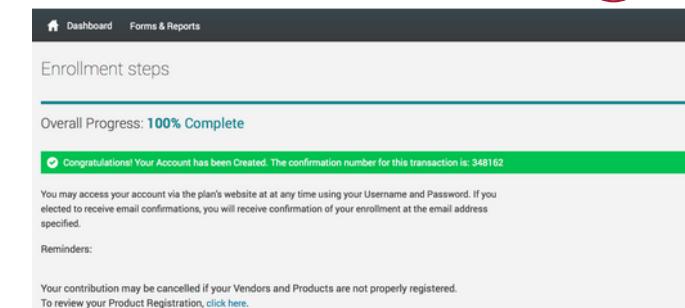
All future contributions to the plan will be invested as follows:

BlankRock Total Return Fund K	40.00%
TIAA-CREF Lifecycle 2055	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**

Congratulatory 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.

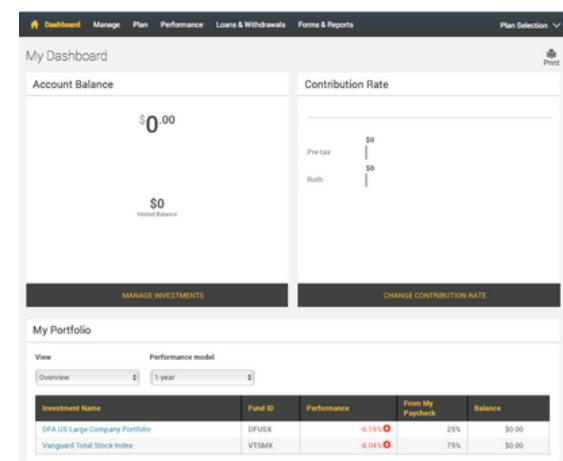
Reminders:

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 Forms & Reports

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My Dashboard

Account Balance: \$0.00

Contribution Rate: Pre-tax: \$0, Roth: \$0

MANAGE INVESTMENTS **CHANGE CONTRIBUTION RATE**

My Portfolio

View	Performance model
Overview	1 year
Investment Name	
DFA US Large Company Portfolio	FDFSK
Vanguard Total Stock Index	VTSMX
Performance	
-6.19%	25%
-8.04%	75%
From My Paycheck	
\$0.00	\$0.00
Balance	
\$0.00	\$0.00



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