

403(b) Plan Enrollment Instructions



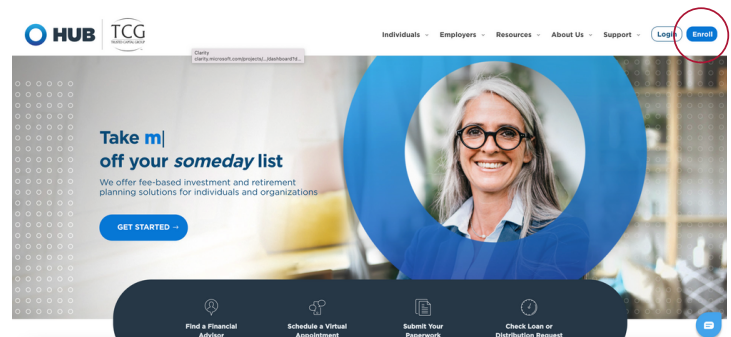
These are instructions for **FIRST TIME USERS** creating a 403(b) account.

TRADITIONAL 403(b): This plan automatically deducts part of your salary into the retirement savings plan before taxes are taken out. The money grows tax-deferred until it's withdrawn, and then the taxes come due.

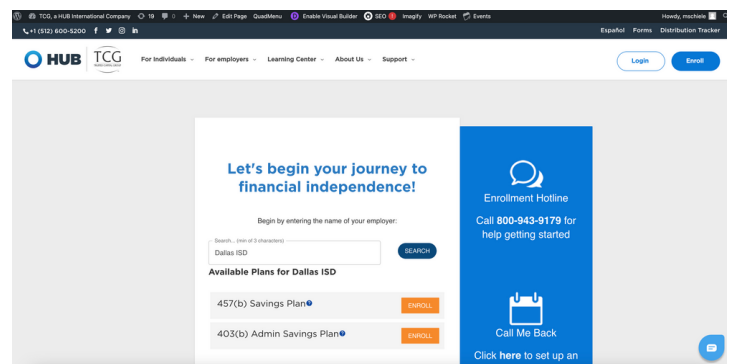
ROTH 403(b): This plan automatically deducts part of your salary into the retirement savings plan after taxes are taken out. The interest and earnings withdrawn from a Roth Account are tax-free if the distribution is considered "qualified."

REMINDER: You can have both a traditional and a Roth 403(b)—and contribute to one or both at the same time—if allowed by your plan.

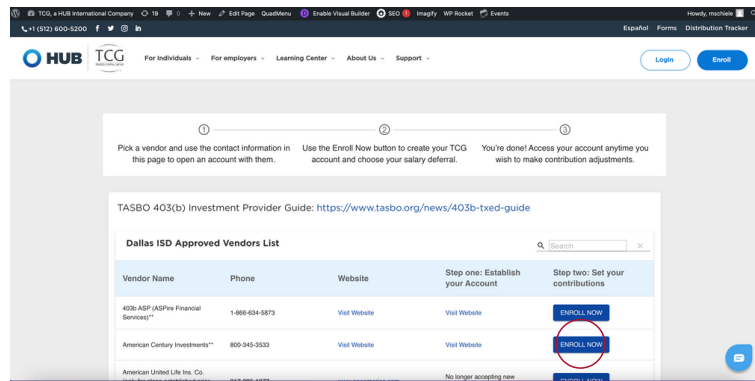
1. Go to www.tcgservices.com and click enroll **Enroll**



2. Type the name of your **Employer** in the search box and click **Enroll** on the **403(b) Savings Plan**.



3. Scroll through the approved vendor list and select **Enroll Now** for the vendor you want to choose.



4. 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:

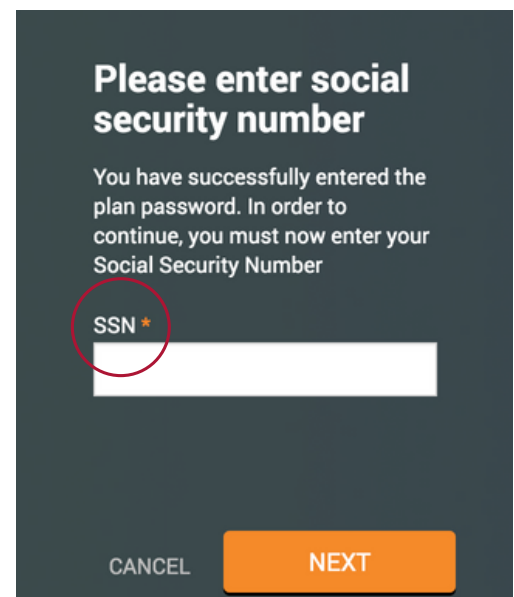
Social Security number: 123-45-6789

Birthday: 01/02/1980

Username: 123456789

Password: 01021980

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



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

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Personal Information

Overall Progress: **0% Complete**

Username Information

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

Establish your username *

testusername

(alphanumeric digits, case-sensitive)

Establish your password *

Re-enter password *

Remember your Username and Password. You will need them to access your account via the plan website in the future.

Security Questions and Answers

In the event that you lose your Password, please set up the answer to your "Lost Password" verification question.

Verification question: What is your pet's name? Verification answer: Mopai

Your Personal Information

First name: TestUserFirst Last name: TestUserLast

Date of birth (mm/dd/yyyy): 05/11/2000 Date of hire: 08/12/2015

Gender: ☐ Male ☒ Female

Street address 1: 3333 Test Street Street address 2:

City: Test City State: TX Zip code: 77777

Country: USA

Home phone: S12: 600 5000

Office phone: S12: 600 6000 Ext:

Other phone: S12: 600 7000

Email

If you would like to receive confirmations of transactions, please fill out the following information.

Home: testuser@gmail.com Confirm home email address: testuser@gmail.com

Office: Confirm office email address:

Other: Confirm other email address:

Where would you like your participant statements sent? ☒ Home ☐ Office ☐ None ☐ I do not have an email address

*Note: Be sure to continue through all steps of the enrollment process until you receive confirmation that your enrollment is complete. If you cancel or close your browser before completing the process, your enrollment will not be processed.

CANCEL NEXT

6. Investment Elections—Under the **403(b) Pretax Deferral** heading are listed all 403(b) investment funds offered or (if allowed in your plan) click **403(b) Roth Deferral** to reveal all investment funds available for Roth contributions.

Select Investments

Overall Progress: **50% Complete**

Any changes submitted will be reflected on your current election report by 10:00 AM the following business day.

CAUTION: Changes you make to your investment elections take place immediately. Changes to your Total Election Amount Deducted per Pay Period take place after being processed by your employer. The new deduction per pay period you enter will replace the current deferral amount completely.

CAUTION: If you elect a percentage deduction, the percent you elect will be the percent deducted per pay period. (a total election of 50% = one half of your paycheck)

> Investment Provider Elections

403(b) Pretax Deferral

Investment Provider	Current % Election	New % Election	
American Century Investments	\$0.00		\$ 0.00
Affiliated Life & Life	\$0.00		\$ 0.00
Americo Financial Life and Annuity Insurance	\$0.00		\$ 0.00
Annuity Investors Life Insurance (Sweet American)	\$0.00		\$ 0.00
Aspire Financial	\$0.00		\$ 0.00

7. Next you will apply the dollar amount of your contribution to the investment(s) of your choice.

7a. If you wish to make contribution on a pre-tax basis, click the 403(b) Pretax Deferral option and assign your elected amounts. Click the authorize checkbox to proceed with your enrollment.

Select Investments

Overall Progress: 50% Complete

Any changes submitted will be reflected on your current election report by 10:00 AM the following business day.

CAUTION: Changes you make to your investment elections take place immediately. Changes to your Total Election Amount Deducted per Pay Period take place after being processed by your employer. The new deduction per pay period you enter will replace the current deferral amount completely.

CAUTION: If you elect a percentage deduction, the percent you elect will be the percent deducted per pay period. (a total election of 100% = one half of your paycheck)

Investment Provider Elections

403(b) Pretax Deferral

Investment Provider	Current \$ Election	New \$ Election
American Century Investments	\$0.00	\$0.00
American United Life	\$0.00	\$0.00
American Financial Life and Annuity Insurance	\$0.00	\$0.00
Annuity Investors Life Insurance (Great American)	\$0.00	\$0.00
Apex Financial	\$0.00	\$0.00
AXA Equitable Life Insurance	\$0.00	\$0.00
CM Life	\$0.00	\$0.00
Commonwealth Annuity	\$0.00	\$0.00
FAM Funds	\$0.00	\$0.00
Federated Funds	\$0.00	\$0.00
Fidelity Security Life Insurance Company	\$0.00	\$0.00
Frost Insurance	\$0.00	\$0.00
Franklin Templeton Investments	\$0.00	\$0.00
GWIN Securities Inc.	\$0.00	\$0.00
Honore Mann	\$0.00	\$0.00
Industrial Alliance Pacific (acquired by Security Benefit)	\$0.00	\$0.00
ISC Group	\$0.00	\$0.00
Jefferson National Life Insurance Company	\$0.00	\$0.00
Legend Group Inc.	\$0.00	\$0.00
Lincoln Financial Group	\$0.00	\$0.00
Lincoln Investment Planning Inc.	\$0.00	\$0.00
Mut Life	\$0.00	\$0.00
Millard National Life Insurance Company	\$0.00	\$0.00
Modern Woodmen of America	\$0.00	\$0.00
National Life Group	\$0.00	\$0.00
New York Life Insurance and Annuity Corporation	\$0.00	\$0.00
North American Co for Life and Health Insurance	\$0.00	\$0.00
Optimismar Funds Distributor	\$0.00	\$0.00
Percepta Retirement Services	\$0.00	\$0.00
Plainsboro State Corp.	\$0.00	\$0.00
RiverSource Investments	\$0.00	\$0.00
Rydex Investments	\$0.00	\$0.00
Security Benefit	\$0.00	\$0.00
Sevcon Group Funds	\$0.00	\$0.00
Symetra Life Insurance Company	\$0.00	\$0.00
T Rowe Price Trust Company	\$0.00	\$0.00
The Vanguard Group	\$0.00	\$0.00
Thrivent Financial for Lutherans	\$0.00	\$0.00
Transamerica Life Insurance Co.	\$0.00	\$0.00
USAA Life Insurance Company	\$0.00	\$0.00
Valic	\$0.00	\$0.00
VITA Financial (Formerly VGL Life)	\$0.00	\$0.00
VITA Financial (Formerly VGL Life)	\$0.00	\$0.00
Wells & Wells	\$0.00	\$0.00
Western National Life Insurance Company	\$0.00	\$0.00

☐ I authorize the investment election changes to this money source

RESET TABLE

403(b) Roth Deferral

BACK NEXT

7b. If you wish to make a Roth contribution, click the 403(b) Roth Deferral option and assign your elected amounts. Click the authorize checkbox to proceed with your enrollment.

Select Investments

Overall Progress: 50% Complete

Any changes submitted will be reflected on your current election report by 10:00 AM the following business day.

CAUTION: Changes you make to your investment elections take place immediately. Changes to your Total Election Amount Deducted per Pay Period take place after being processed by your employer. The new deduction per pay period you enter will replace the current deferral amount completely.

CAUTION: If you elect a percentage deduction, the percent you elect will be the percent deducted per pay period. (a total election of 100% = one half of your paycheck)

Investment Provider Elections

403(b) Roth Deferral

Investment Provider	Current \$ Election	New \$ Election
American Century Investments	\$0.00	\$0.00
Annuity Investors Life Insurance (Great American)	\$0.00	\$0.00
Apex Financial	\$0.00	\$0.00
AXA Equitable Life Insurance	\$0.00	\$0.00
FAM Funds	\$0.00	\$0.00
Federated Funds	\$0.00	\$0.00
Fidelity Security Life Insurance Company	\$0.00	\$0.00
Frost Insurance	\$0.00	\$0.00
GWIN Securities Inc.	\$0.00	\$0.00
Honore Mann	\$0.00	\$0.00
Legend Group Inc.	\$0.00	\$0.00
Lincoln Financial Group	\$0.00	\$0.00
Lincoln Investment Planning Inc.	\$0.00	\$0.00
Mut Life	\$0.00	\$0.00
National Life Group	\$0.00	\$0.00
Optimismar Funds Distributor	\$0.00	\$0.00
Percepta Retirement Services	\$0.00	\$0.00
Plainsboro State Corp.	\$0.00	\$0.00
RiverSource Investments	\$0.00	\$0.00
Rydex Investments	\$0.00	\$0.00
Security Benefit	\$0.00	\$0.00
Sevcon Group Funds	\$0.00	\$0.00
Symetra Life Insurance Company	\$0.00	\$0.00
T Rowe Price Trust Company	\$0.00	\$0.00
Valic	\$0.00	\$0.00
VITA Financial (Formerly VGL Life)	\$0.00	\$0.00
VITA Financial (Formerly VGL Life)	\$0.00	\$0.00
Wells & Wells	\$0.00	\$0.00
Western National Life Insurance Company	\$0.00	\$0.00

☐ I authorize the investment election changes to this money source

RESET TABLE

BACK NEXT

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

Click **SUBMIT** when you are satisfied.

Dashboard Forms & Reports Plan Selection

Enrollment steps

Overall Progress: **66% Complete**

Confirm & Submit

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

Please Note:

This submission will not create an account with the Investment Providers. By completing this election, you agree to the terms of the electronic salary reduction agreement, that can be viewed by clicking here

Username: testusername
First name: TestUserFirst
Last name: TestUserLast
Street address 1: 3333 Test Street
Street address 2:
City: Test City
State: TX
Zip code: 77777
Country: USA
Date of birth: 05/11/2000
Date of hire: 08/12/2015
Home phone: (512) 600-5000
Office phone: (512) 600-6000 Ext
Other phone: (512) 600-7000
Home email address: testuser@gmail.com
Office email address:
Send email confirmation to: Home

Security Question

Security Question 1
What is your pet's name?
Answer 1
Mopsi

Investment Elections

Employee Deferral

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

AXA Equitable Life Insurance : \$25.00
Jefferson National Life Insurance Company : \$25.00
Life Insurance Company of the Southwest : \$10.00
PlanMember Svcs Corp. : \$35.00
Rydex Investments : \$25.00
Transamerica Life Insurance Co : \$60.00

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

SUBMIT

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

Please note: Your contribution may be cancelled if you have not set up an account with the vendor(s). To review your vendor registrations, **click here**.

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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](#).



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Disclosures:

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