

457(b) Admin Plan Enrollment Instructions



Important note about your 457(b) Contributions: If you have not established a 457(b) Admin vendor account for this employer prior to enrolling with TCG to establish contributions, your contributions may be canceled and/or refunded back and not invested. The 457(b)Admin vendor account needs to be open and ready to accept funds, specific to this employer, and would need to be a current approved vendor for this employer. If you have any additional questions on this process, contact us.

These are instructions for **FIRST TIME USERS** creating a 457(b) Admin account.

TRADITIONAL 457(b) Admin

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 The money grows tax-deferred until it's withdrawn, and then the taxes come due.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 457(b) Admin

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 The interest and earnings withdrawn from a Roth Account are tax-free if the distribution is considered "qualified."*

****Note:** For Roth 403(b) contributions, the plan must allow Roth contributions. You can refer to the Summary Plan Description for your employer and plan on our website, or you can always call us at 1-800-943-9179 to confirm.*

Also, not all approved vendors for the employer may offer Roth, even if the plan does. That information can be found on the approved vendor list for our site - or you can always call us to confirm.

Also, if you're wanting to contribute Roth, and the plan allows it, and the vendor allows it, make sure you notify your vendor when establishing the 403(b) on their end that you wish to contribute Roth. Some companies may require a separate account type specifically for Roth funds.

Reminder

You can have both a traditional and a Roth 457(b) Admin—and contribute to one or both at the same time—if allowed by your plan. While you can contribute Pre-Tax and Roth, the annual MAC limit for Pre-Tax and Roth 403(b) contributions are combined.

1. Go to www.tcgservices.com/documents and type in the **name of your employer**.

2. Select the **457(b) Admin** tab and click to view the **Approved Vendor List**.

Research a vendor from the provided list and reach out to them directly to establish an investment account.

3. Now let's establish your TCG Administrators account. Visit tcgservices.com/enroll and type in your employer's name.

Then, click the **Enroll** button by the 457(b) Savings Plan.

[Important note about your 457\(b\) Contributions:](#)

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The screenshot shows the top navigation bar of the TCG HUB website with links for 'For Individuals', 'For employers', 'Learning Center', 'About Us', and 'Support'. Below the navigation bar is a search section titled 'Search for your employer to find your Plan Information'. It includes a text input field labeled 'Search... (min of 3 characters)' and a 'SEARCH' button. Below the search section is a link that says 'Looking for an RMD form?'.

This screenshot shows the '457(b) Admin' plan page. At the top, there are two tabs: '403(b) Admin' and '457(b) Admin', with the latter being selected and circled in red. Below the tabs is a description of the 457(b) Admin plan. Under the 'Plan Description' heading, there are four links: '457(b) Admin Summary Plan Description', '457(b)City College of San Francisco - Deadline Dates for Payroll Changes', '457(b) CCSF Approved Vendor List' (which is underlined in red), and '457(b) Admin 3-Year Catch Up Form'.

Let's begin your journey to financial independence!

The screenshot shows the enrollment page for 'City College of San Francisco'. It starts with the instruction 'Begin by entering the name of your employer:' followed by a search bar containing 'City College of San Francisco' and a 'SEARCH' button. Below this is the heading 'Available Plans for City College of San Francisco'. There are two plan entries: '457(b) Admin Savings Plan' and '403(b) Admin Savings Plan'. Each entry has an 'ENROLL' button next to it, with the 'ENROLL' button for the 457(b) plan circled in red.

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:

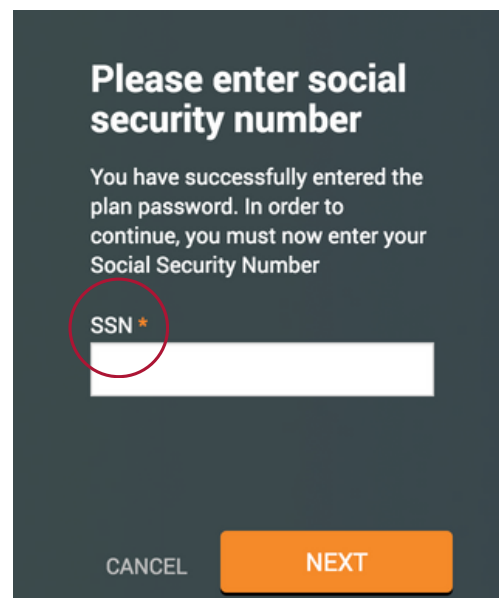
Social Security number: 123-45-6789

Birthday: 01/02/1980

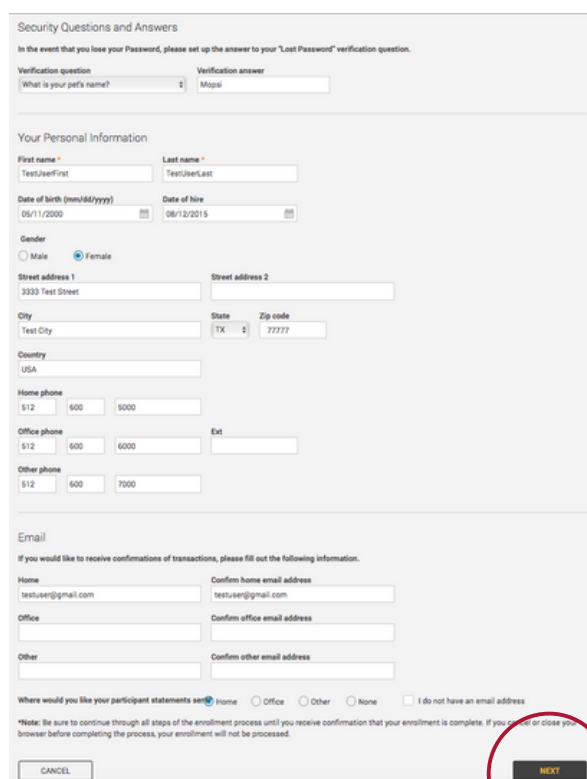
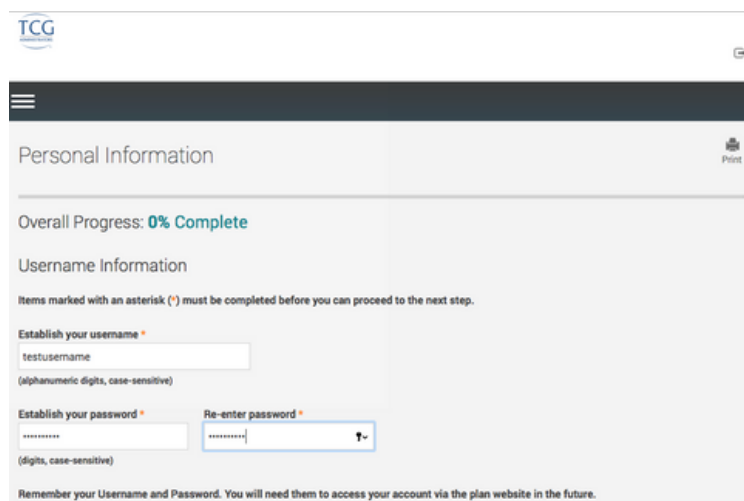
Username: 123456789

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**.



6. Investment Elections—Under the **457(b) Pretax Deferral** heading are listed all 457(b) investment providers offered or (if allowed in your plan) click **457(b) Roth Deferral** to reveal all investment providers available for Roth contributions.

Select Investments Print

Overall Progress: **50% Complete**

The investment election percentages you enter below will be applied to the selected source of money. Please note that once you have completed the enrollment process, you can always change your investment election percentages. For more information, please contact your plan administrator once you have completed the enrollment process.

> Investment Provider Elections

Employee Deferral

Dollar

Investment Provider	Current IP Election	New IP Election
American Century Investments	\$0.00	\$ 0.00
Aspire Financial	\$0.00	\$ 0.00
CalSTRS Pension2	\$0.00	\$ 0.00
Corebridge Financial, formerly AIG Retirement Services	\$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 457(b) Pretax Deferral option and assign your elected amounts. Click the authorize checkbox to proceed with your enrollment.

Employee Deferral Changes Pending

Dollar

Investment Provider	Current IP Election	New IP Election
American Century Investments	\$0.00	\$ 0.00
Aspire Financial	\$0.00	\$ 0.00
CalSTRS Pension2	\$0.00	\$ 0.00
Corebridge Financial, formerly AIG Retirement Services	\$0.00	\$ 0.00
Horace Mann Life Insurance	\$0.00	\$ 0.00
Industrial Alliance Pacific (acquired by Security Benefit)	\$0.00	\$ 0.00
Legend Group Inc.	\$0.00	\$ 0.00
Lincoln Investment Planning Inc.	\$0.00	\$ 0.00
National Life Group	\$0.00	\$ 0.00
Orion Portfolio Solutions, LLC	\$0.00	\$ 0.00
PenSelect SmartSAV	\$0.00	\$ 0.00
PlanMember Svcs Corp.	\$0.00	\$ 0.00
Security Benefit	\$0.00	\$ 0.00
TIAA-CREF	\$0.00	\$ 0.00
VOYA Financial (formerly ING Life)	\$0.00	\$ 0.00
VOYA ReliaStar (formerly ING ReliaStar)	\$0.00	\$ 0.00
	\$0.00	\$0.00

☒ I authorize the investment election changes to this money source

7b. If you wish to make a Roth contribution, click the 457(b) Roth Deferral option and assign your elected amounts. Click the authorize checkbox to proceed with your enrollment.

Employee Roth Deferral Changes Pending

Dollar

Investment Provider	Current IP Election	New IP Election
American Century Investments	\$0.00	\$ 0.00
Aspire Financial	\$0.00	\$ 0.00
CalSTRS Pension2	\$0.00	\$ 0.00
Corebridge Financial, formerly AIG Retirement Services	\$0.00	\$ 0.00
Horace Mann Life Insurance	\$0.00	\$ 0.00
Industrial Alliance Pacific (acquired by Security Benefit)	\$0.00	\$ 0.00
Legend Group Inc.	\$0.00	\$ 0.00
Lincoln Investment Planning Inc.	\$0.00	\$ 0.00
National Life Group	\$0.00	\$ 0.00
Orion Portfolio Solutions, LLC	\$0.00	\$ 0.00
PenSelect SmartSAV	\$0.00	\$ 0.00
PlanMember Svcs Corp.	\$0.00	\$ 0.00
Security Benefit	\$0.00	\$ 0.00
TIAA-CREF	\$0.00	\$ 0.00
VOYA Financial (formerly ING Life)	\$0.00	\$ 0.00
VOYA ReliaStar (formerly ING ReliaStar)	\$0.00	\$ 0.00
	\$0.00	\$0.00

☒ I authorize the investment election changes to this money source

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

Click **SUBMIT** when you are satisfied.

Overall Progress: **66% Complete**

Almost Done! Confirm & Submit

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

Personal Information Edit

Username: [REDACTED]
First name: 457 Admin
Last name: Test
Middle name:
Street address 1:
Street address 2:
City:
State:
Zip code:
Country:
Date of birth:
Date of hire:

Home phone: () -
Office phone: () - Ext
Other phone: () -
Home email address:
Office email address:
Other email address:
Send email confirmation to: None

Investment Elections Edit

Employee Deferral Edit

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

CalSTRS Pension2: \$500.00

Employee Roth Deferral Edit

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.

TCG ADMINISTRATORS

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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