



**VERNON**  
PUBLIC SCHOOLS

“in partnership with family and community”

## We are excited to announce **The OMNI Group** as our 403(b) Third Party Plan Administrator!

In partnership with Vernon Public Schools, OMNI will ensure that the district, the employee 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 any and all 403(b) transactions, as well as the implementation of Salary Reduction Agreement (SRA) forms. Refer to the instructions on the following pages to submit an SRA or any of the following transactions.

- Distribution (including distributions due to age, death, disability, separation from service, and domestic relations orders).
- Exchanges/Transfer/Rollover of 403(b) funds between vendors or 403(b) plans
- Hardship distribution
- Loans
- Purchase of Service Credits

In the event that you wish to make a change to your 403(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.

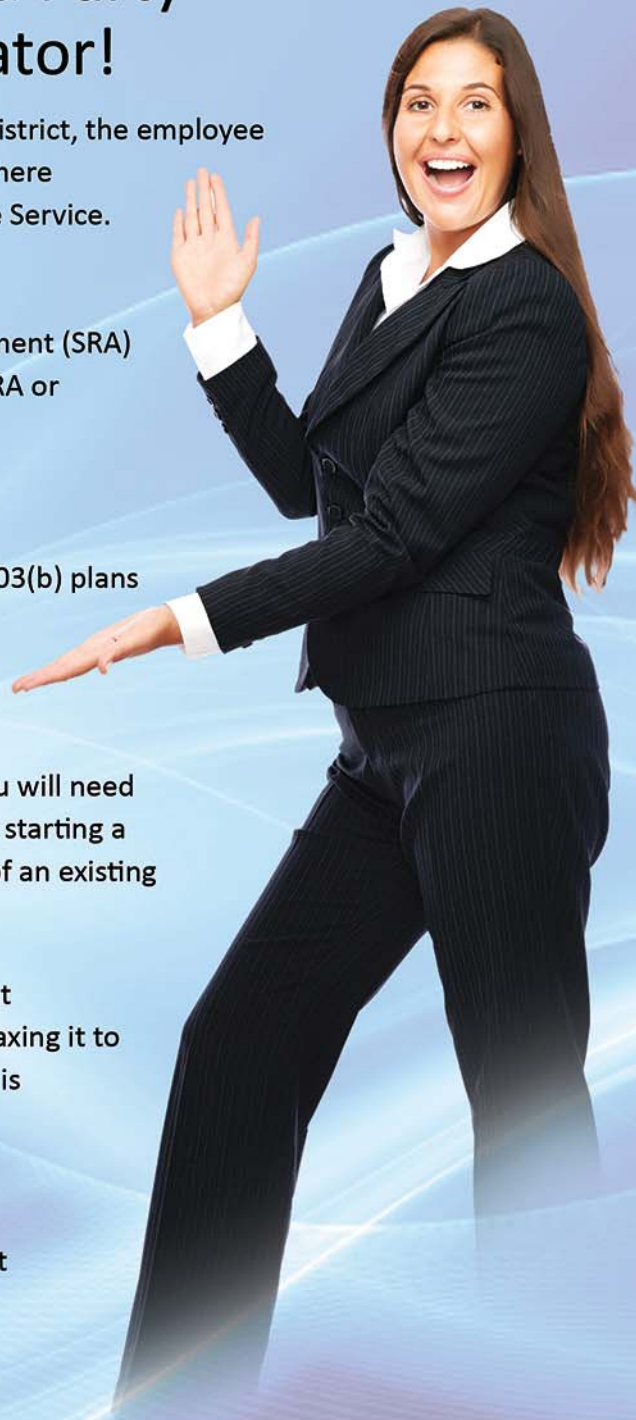
The SRA form can be found in the “Forms” section of **OMNI's** website at [www.omni403b.com](http://www.omni403b.com). You have the option of printing out a form and faxing it to **OMNI** or completing the form electronically on their secure website. It is suggested that you complete the electronic SRA 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)**



Follow us for daily 403(b) information.





# VERNON PUBLIC SCHOOLS

“in partnership with family and community”

## Vernon Public Schools

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

Go to OMNI's website at [www.omni403b.com](http://www.omni403b.com) and select the purple button labeled **“Participants”**:

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



On the same page, in the lower left-hand corner begin entering the **Employer Name**. Note that when you begin typing the name, a dropdown box will appear where you can select your organization's name.





# VERNON PUBLIC SCHOOLS

“in partnership with family and community”

You have now reached the Vernon Public School webpage where you will find the following information:

- 1. Plan Features** – Outlines what is or is not permitted within the plan based on the organization’s current plan document.
- 2. Participating Service Providers** – Add or open an account choosing from the investment service providers that have been approved in our plan.
- 3. Salary Reduction Agreement (SRA)** – Employees can submit an on-line SRA form to start, stop or make a change to their contribution. You must already have an account established with your selected service provider before submitting an SRA.
- 4. Plan Transactions** – You’ll find the forms needed to initiate transactions such as a distribution, hardship or loan.

**Please note: If you are currently contributing to multiple investment providers, please be sure to list all contributions you wish to continue on the new SRA. Any current 403(b) or ROTH 403(b) contributions not listed on the new SRA will be discontinued.**



## New accounts may be opened with following approved service providers

- Aspire
- American Financial Services Inc.
- AXA Equitable Life Insurance Company
- First Investors Corporation
- Great American Insurance Group
- Horace Mann Life Ins. Co.
- MetLife
- MetLife (FC)
- Voya Financial (ILIAC)

**Please note: Putnam and Vanguard may still be accessed through Aspire**

## Check us out on Social Media!

OMNI recently updated our Facebook , Twitter and LinkedIn pages and we encourage you to like our Facebook page “OMNI 403b” and follow us on Twitter “@omni403b”. Our content will have helpful information for retirement planning. Additionally we will be posting company updates and newsletters along with contests and prizes.

