



## Allen ISD

## Summary Plan Description

### Plan Type

Internal Revenue Code Section 457(b)

### Plan Administrator

TCG Administrators

### Excluded Employees

Employees with non-permanent schedules according to district policy

### Plan Password for Enrolling Online

allen457

### Plan Effective Date

07/01/2009

### Plan Year End

2019

### Contribution Tax Treatment

Pre-Tax and Roth

### Contribution Sources

Employee Only

### Roth 457(b)

Available

### Contribution Limit

\$19,000 per year

### Catch-Up Contribution Limit

\$6,000 for employees age 50+

### Rollovers Into Plan

Available from another qualified plan

### Rollovers Out of Plan

Available to another qualified plan, upon termination of service

### Distributions

Available for the following:

- Separation of Service
- Death
- Disability

### Beneficiaries

A Designation of Beneficiary Form is only required if Spouse is not the Primary Beneficiary

### Loans

Available, see the Loan Agreement and Application Form

### Unforeseeable Emergency Distribution

Available as defined by the IRS for this type of plan

### Inactivity Distributions

Available for accounts with balances of less than \$5,000, and no activity for 2 years

### Grandfathered Vendors

N/A

### Fees of Service Plan Providers

#### TCG Administrators, TPA

\$22.00 per participant per year  
0.25% of assets, paid by the participant

#### TCG Advisors, Investment Advisor

0.42% of assets, paid by participant

#### Other Fees

\$30 Distribution Fee  
\$50 Loan Set up  
All of the above paid by participant

#### Matrix Trust, Custodian/Trustee

0.10%, paid by participant

#### ESC Region 10, Plan Coordinator

\$0.10 per participant per month, paid by participant

**For more information please contact TCG Administrators, the Plan Administrator  
800-943-9179**