

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.

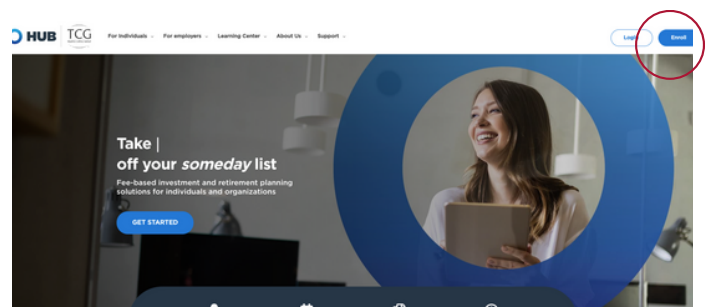
Roth 457(b)

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 The interest and any earnings withdrawn from a Roth account are tax-free if the distribution is considered “qualified.”

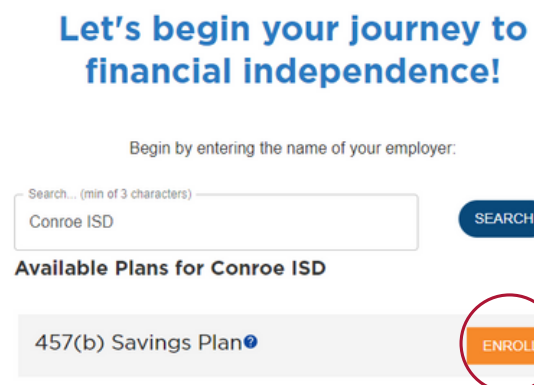
Reminder

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 **Login**. Next, click on the **Enroll** button.



2. Type the name of your **employer** in the search box and click on the **457(b) plan Enroll button**.



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:

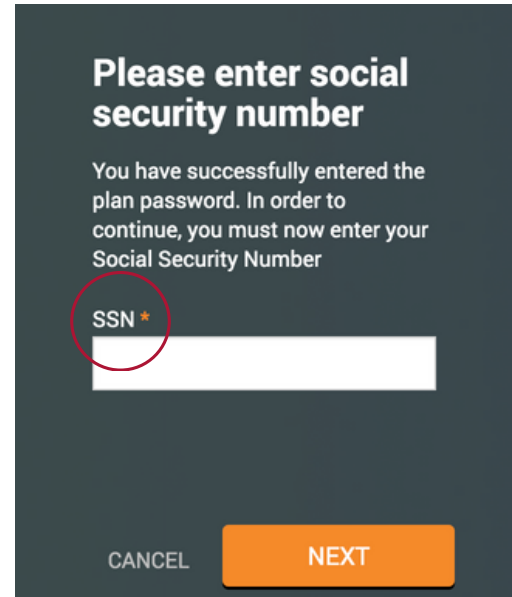
Enter your Social Security Number as the **username**, and your birthday in numerical digits (MMDDYYYY) as the **password**.

For example:

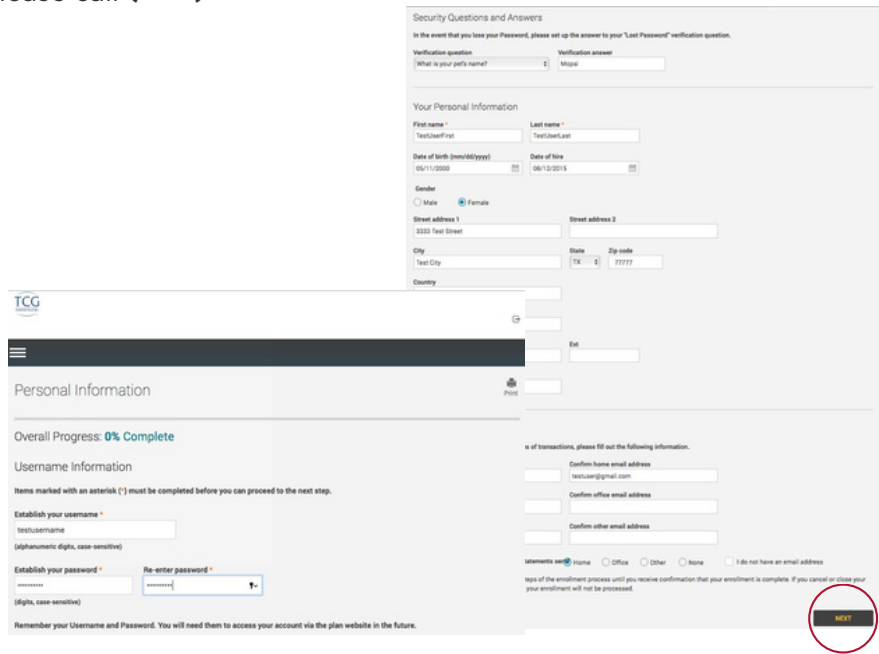
Social Security number: 123-45-6789
 Birthday: 01/02/1980

Username: 123456789
Password: 01021980

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

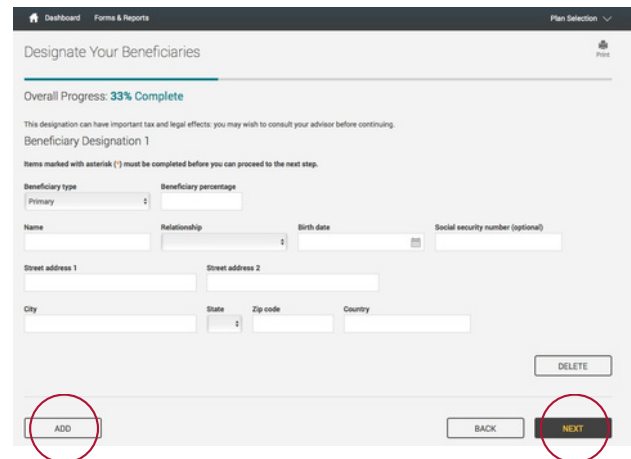


4. Create your Username and Password; enter all personal information; then click **NEXT**.



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.



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.

Dashboard Forms & Reports Plan Selection

Contributions

Overall Progress: **40% Complete**

Current Contribution Amounts

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

Change Contribution Amounts
Please enter a contribution percentage or dollar amount that your employer will deduct from your compensation each payroll period for deposit to your account.

> Rules and Criteria

Action	Contribution Type	Percent/Dollar	Current Contribution	New Contribution Rate
No change	Pre-Tax Deferral	Dollar	Not contributing	0.00 per pay period
No change	Roth	Dollar	Not contributing	0.00 per pay period

RESET BACK **NEXT**

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

Dashboard Forms & Reports Plan Selection

Select Investments

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.

I elect to invest all future contributions (including employee and employer contributions) as follows.

> Rules and Criteria

> **All Sources**

BACK **NEXT**

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

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

Dashboard Forms & Reports Plan Selection

Select Investments

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.

I elect to invest all future contributions (including employee and employer contributions) as follows.

> Rules and Criteria

> **All Sources**

Investment	Current Election	New Election
FF Invest Aggressive Growth Portfolio	0.00%	0.00%
FF Invest Balanced Portfolio	0.00%	0.00%
FF Invest Conservative Portfolio	0.00%	0.00%
FF Invest Growth Portfolio	0.00%	0.00%
FF Invest Preservation Portfolio	0.00%	0.00%
Fidelity Government Money Market Fund	0.00%	0.00%
American Funds New World RE	0.00%	0.00%
BlackRock Total Return Fund K	0.00%	0.00%
Fidelity 500 Index Fund	0.00%	0.00%
Fidelity Advisor Stock Sector Small Cap Z	0.00%	0.00%
Fidelity Advisor Total International Equity Z	0.00%	0.00%
iShares Total US Stock Market Index Fund	0.00%	0.00%
Lord Abbett Short Duration Income R3	0.00%	0.00%
TIAA CREF LifeCycle Retirement	0.00%	0.00%
TIAA CREF LifeCycle 2025	0.00%	0.00%
TIAA CREF LifeCycle 2030	0.00%	0.00%
TIAA CREF LifeCycle 2035	0.00%	0.00%
TIAA CREF LifeCycle 2040	0.00%	0.00%
Vanguard Developed Markets Index Admiral	0.00%	0.00%
Vanguard Emerging Markets Stock Index Admiral	0.00%	0.00%
Vanguard Growth Index Fund Admiral Share	0.00%	0.00%
Vanguard Intermediate-Term Bond	0.00%	0.00%
Vanguard Life Strategy Conservative	0.00%	0.00%
Vanguard Life Strategy Growth	0.00%	0.00%
Vanguard Life Strategy Income	0.00%	0.00%
Vanguard Life Strategy Moderate Growth	0.00%	0.00%
Vanguard Mid Cap Index Fund Admiral Share	0.00%	0.00%
Vanguard Small Cap Index Fund Admiral Share	0.00%	0.00%
Vanguard Value Index Fund Admiral Share	0.00%	0.00%
Victory Income R3	0.00%	0.00%
SPK Global Real Estate Securities	0.00%	0.00%
SPK Inflation Protected Securities	0.00%	0.00%
TIAA CREF LifeCycle 2020	0.00%	0.00%
TIAA CREF LifeCycle 2025	0.00%	0.00%
TIAA CREF LifeCycle 2030	0.00%	0.00%
TIAA CREF LifeCycle 2035	0.00%	0.00%
TIAA CREF LifeCycle 2040	0.00%	0.00%
TIAA CREF LifeCycle 2045	0.00%	0.00%
TIAA CREF LifeCycle 2050	0.00%	0.00%
TOTAL	0.00%	0.00%

RESET TABLE

BACK **NEXT**

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 Edit

Username: Jand00123
 First name: Jane
 Last name: Doe
 Middle name: Doe
 Street address 1: 1234 Park Row St.
 Street address 2:
 City: Conroe
 State: TX
 Zip code: 77385
 Country: US
 Date of birth: 01-01-1970
 Date of hire: 01-01-2024

Home phone: 0 - 0
 Office phone: 0 - 0
 Other phone: 0 - 0
 Home email address:
 Office email address:
 Other email address:
 Send email confirmation to: None

Security Question

Security Question 1: What is your mother's maiden name? Answer 1: Green
 Security Question 2: What is your pet's name? Answer 2: Spot

Salary Deferral Elections Edit

Pre-tax contributions: Deduct \$50.00 each pay period.
 Roth contributions: Deduct \$50.00 each pay period.

Beneficiary Designations Edit

Primary Beneficiary

Name	John Doe	City	Conroe
Beneficiary percentage	0.00%	State	TX
Relationship	Spouse	Zip code	77385
Birth date		Country	
Home address		Social security number (optional)	
Street address 1	1234 Park Row St.		
Street address 2			

Investment Elections Edit

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

FF Invest Growth Portfolio: 40.00%
 TSMX CREF Lifecycle 2040: 60.00%

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.

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](#).

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.)

My Dashboard

Account Balance: \$0.00
 \$0 Unvested Balance

Contribution Rate

Pre-tax: \$0
 Roth: \$0

My Portfolio

View: Overview | Performance model: 1 year

Investment Name	Fund ID	Performance	From My Paycheck	Balance
DFA US Large Company Portfolio	DFUSX	-6.1% 📉	25%	\$0.00
Vanguard Total Stock Index	VTSAX	-6.6% 📉	75%	\$0.00

