



We are excited to announce **U.S. OMNI** as our **403(b) Third Party Plan Administrator!**

In partnership with **Hebron Public Schools**, OMNI will ensure that the plan sponsor, the participants, each of the investment providers and their agents adhere to the many compliance regulations mandated by the Internal Revenue Service.

**Starting or changing your contributions:**

If you wish to start contributing or make a change to your current contributions, 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 provider.

The SRA form can be found in the “Employees” tab under “Start | Change Contributions” section of OMNI’s website at [www.omni403b.com](http://www.omni403b.com). From there, you will select your employer state in the dropdown and enter your employer name. You have the option of printing out a form and faxing it to OMNI or completing the form electronically on their secure website. OMNI also now offers a new SRA Express Shortened Online form to streamline the process by which new participants may begin making payroll deductions into a single investment account. It is suggested that you complete the electronic SRA form to expedite your request.



OMNI’s services include the review and approval of all 403(b) & 457(b) transactions, and implementation of Salary Reduction Agreement (SRA) forms.

OMNI is available from 7:30 am to 8:00 pm 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)**

[www.omni403b.com](http://www.omni403b.com)

**TRANSACTIONS**



Refer to the instructions on the following pages to submit an SRA or any of the transactions below.

\*Transactions permitted by plan may vary

- > Distributions (including distributions due to age, death, disability, separation from service, and domestic relations orders).
- > Exchanges/Transfers/Rollovers of 403(b) funds between vendors or 403(b) plans
- > Hardship Withdrawals
- > Loans
- > Purchase of Service Credits
- > Qualified Domestic Relations Orders (QDRO)







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:

1

> Employees > Employers > Advisors

- > Start | Change Contributions
- > Transaction Forms
- > **Your Plan Page**
- > Education
- > Employee FAQs

The IRS has rec 2020 Maximum Contribution (M and 457 plans.

Go to OMNI's website at [www.omni403b.com](http://www.omni403b.com) and select "Your Plan Page" under the "Employees" tab

2

Select your Organization:

Employer Name

Next, under select your org, select your **Employer's State** in the dropdown to the left

3

Select your Organization:

AZ

pa | GO

- Palo Verde Elementary School Dist. 49
- Palominas Elementary Dist.

Next to Employer State enter the **Employer Name**. Begin typing the name, a dropdown box will appear and you can select your organization's name.







You have now reached the **Hebron Public Schools** webpage where you will find the following information:

**PLAN DETAILS**

**403(b)**

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



The screenshot shows the OMNI 403(b) website. At the top, it says 'Financial Wellness Center' and 'Select Language' and 'Secure Portal Login'. Below that, it says 'OMNI' and navigation links for 'Employees', 'Employers', and 'Advisors'. The main heading is 'Plan Detail' with a sub-heading 'Plan Details for Your District Name' and a dropdown menu set to '403(b)'. The current status is 'Active'. A large red circle with the number '2' highlights the 'Participating Investment Providers' section. This section lists various investment types (Fixed Annuity, Fixed Index Annuity, Variable Annuity, Investment Advisory Service, Mutual Funds) and provides a table of providers with their phone numbers. A vertical sidebar on the right contains icons and labels for: '1 Start | Change Contributions', '3 Transaction Forms', 'Universal Availability', 'Catch Up Contribution', and 'More Employee Information'. A large red circle with the number '4' highlights the 'Plan Features' section, which lists details for Eligible Employees, Employer Non-Elective Contributions, Loans, Financial Hardship Distribution, Transfers Into/Out of Plan, Service Based Catch-up, Rollover Contributions, ROTH 403(b), Contract Exchanges, and Distributions.

**APPROVED 403(b) PROVIDERS**

AMERIPRISE FINANCIAL/RIVERSOURCE  
EQUITABLE (FORMERLY AXA)  
INVESCO OPPENHEIMERFUNDS  
METLIFE  
VOYA FINANCIAL (VRIAC)

The following Investment Providers are no longer authorized to establish new accounts for this plan. Employees currently contributing to one of these Investment Providers may continue their contributions without interruption.

AMERICAN FUNDS SERVICE COMPANY  
VANGUARD FIDUCIARY TRUST CO.