

The OMNI Group – 403(b) and 457 Third Party Administrator

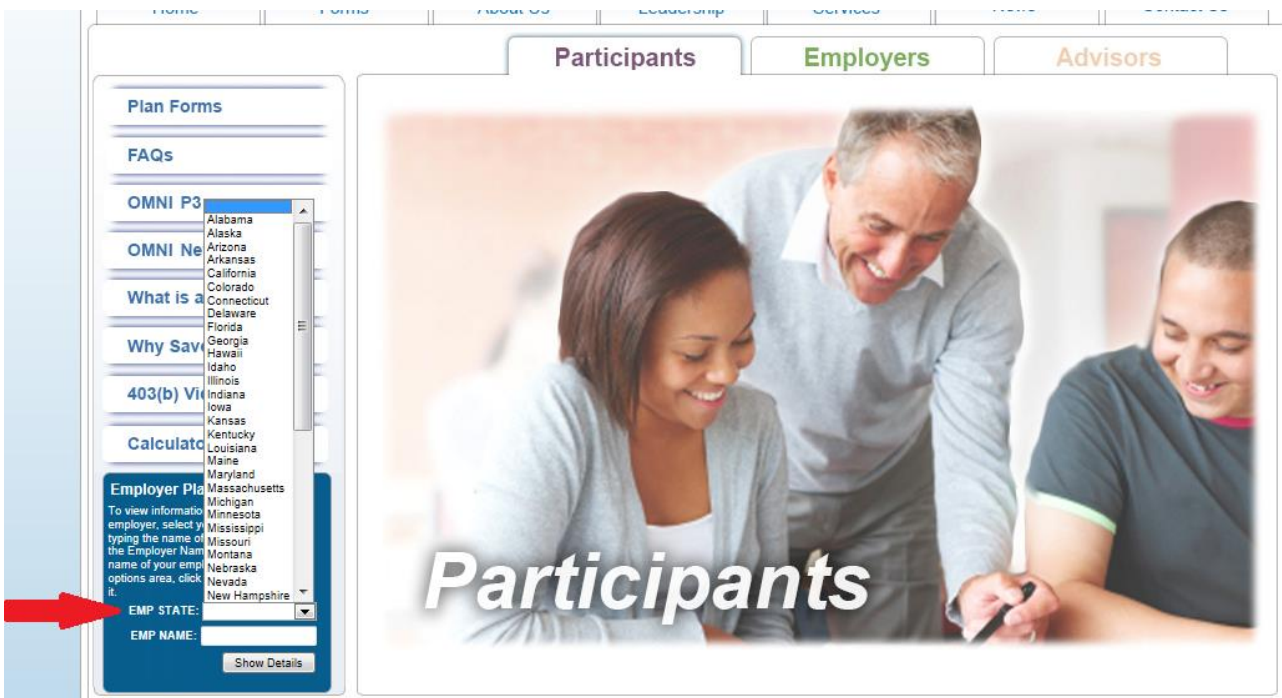
Organization Page

Organization specific plan information is available on OMNI's website at www.omni403b.com. This information can be viewed by following the steps below:

Go to OMNI's website at 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: **ILLINOIS**



On the same page, in the lower left-hand corner begin entering the Employer Name:

COMMUNITY UNIT SCHOOL DISTRICT NO 308. (Note that when you begin typing the name, a dropdown box will appear where you can select the correct name.)

The screenshot shows the 'Participants' tab selected in the top navigation bar. On the left, there is a sidebar with links: Plan Forms, FAQs, OMNI P3, OMNI Newsletter, What is a 403(b) Plan?, Why Save with 403(b), 403(b) Videos, and Calculators. Below these links is the 'Employer Plan Info.' section. It contains a dropdown for 'EMP STATE' set to 'New York' and a text field for 'EMP NAME' with 'C' entered. A red arrow points to a dropdown menu that has appeared, listing several school districts: Albany City SD, Albion CSD, Alden CSD, Alexander CSD, Alexandria CSD, and Altmar-Parish-Williamstown CSD. The word 'Participants' is overlaid in large white text on a background image of three people smiling. At the bottom, there is a footer with social media icons and copyright information.

You have now reached the Organization Page where you will find the following information:

1. Plan Features – This section outlines what is or is not permitted within the plan based on the organization's current plan document.
2. Participating Service Providers – This section identifies those service providers that employees are allowed to make contributions to.
3. Salary Reduction Agreement (SRA) – **Once you have already set up your account with one of our approved Participating Service Providers.** This section is where employees can submit or print an SRA form to start, stop or make a change to their contribution.
4. Service Provider Transactions – This section is where you will find the forms needed to initiate a transaction such as a distribution or loan.


Plan Details **Community Unit School District No 308, Oswego IL**


403(b) Plan Details:

Current Plan Status: Active

Participating Service Providers



 **Agent Info Available**
Click icon next to fund name for details.

 **Online Enrollment Available**
Click icon next to fund name for details.

Ameriprise Financial Services, Inc.

Aspire Financial Services

AXA Equitable Life Insurance Company

Foresters Financial (First Investors)

Horace Mann Life Ins. Co.

Lincoln Investment Planning

MetLife

Thrivent Financial for Lutherans

VALIC

Voya Financial (ING Reliastar)

Forms

Salary Reduction Agreement (SRA):



Salary Reduction Agreement - Online



Salary Reduction Agreement - PDF

Service Based Catch-Up Request:



Online Request Form



Downloadable PDF Version

Plan Transactions:

*For assistance determining the proper service provider transaction form to submit for your situation, please review our **Transaction Instructions** page for more information*



Death Claim



Disability



Distribution



Exchange



Hardship



Loan



QDRO



Rollover



Service Credit



Transfer

For any questions concerning your employers list of participating providers, please contact OMNI at 877-544-6664.

457 Plan Details:

Current Plan Status: Active

Participating Service Providers

457 Providers

Service Providers with a double asterisk notation (**) are not authorized to accept new accounts under your employer's plan. Please contact OMNI® with any questions.

Aspire Financial Services - 457

AXA Equitable Life Ins Company (1) - 457

MetLife - 457

ROTH - AXA Equitable - 457

For any questions concerning your employers list of participating providers, please contact OMNI at 877-544-6664.

Forms

Salary Reduction Agreement (SRA):



457 Salary Reduction Agreement - Online



Salary Reduction Agreement - PDF

Plan Transactions:

*For assistance determining the proper service provider transaction form to submit for your situation, please review our **457 Transaction Instructions** page for more information*



Death Claim



Distribution



QDRO



Service Credit



Loan



Unforeseeable Emergency



Transfer



Rollover



Exchange