# 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):** This plan automatically deducts part of your salary into the retirement savings plan before taxes are taken out. The money grows tax-deferred until it's withdrawn—then the taxes come due.

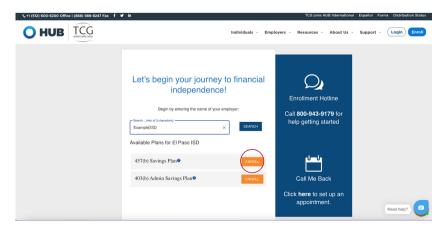
**ROTH 457(b):** This plan automatically deducts part of your salary into the retirement savings plan after taxes are taken out. The interest and earnings withdrawn from a Roth account are taxfree if the distribution is considered "qualified."

**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 <u>www.tcgservices.com</u> and click **Enroll.** 



2. Type the name of your **Employer** in the search box and click **Enroll** on the **457(b)** Savings Plan.



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:

4. Create your Username

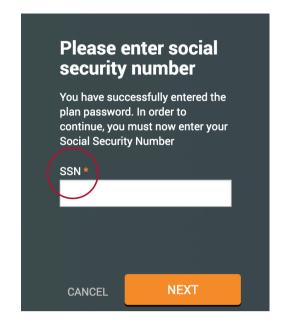
click **NEXT**.

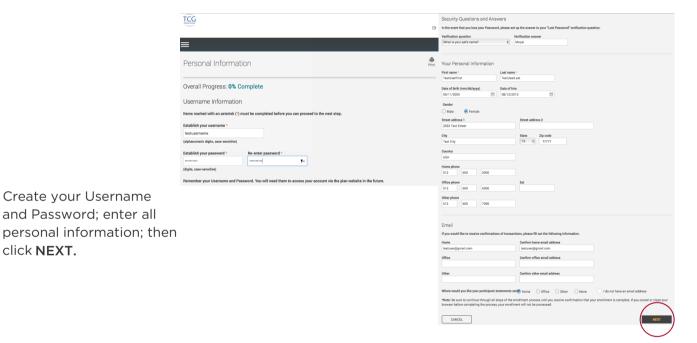
Social Security number: 123456789

Birthday: 01/02/1980

**Username:** 123456789 Password: 01021980

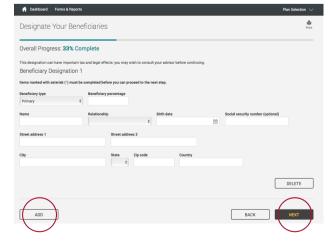
If you are still unable to login, please call (800) 943-9179





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

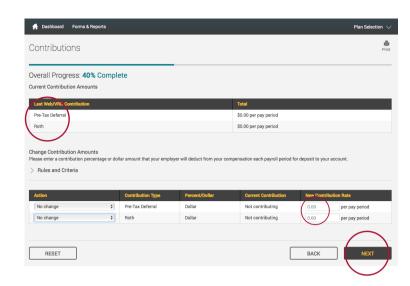
Make your selection from the drop down box—either the **Pre-Tax** or post-tax **Roth** contribution type.

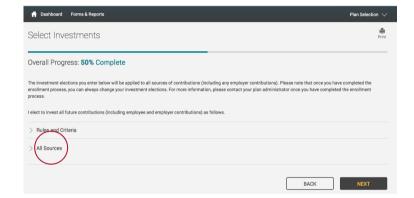
Enter the contribution dollar amount per pay period. (If allowed by your district, you may select your funds by percentages.)

#### Click NFXT.

Please note that the contribution amount is the amount you want deducted from your paycheck EVERY pay period.

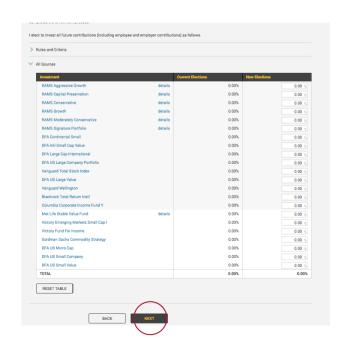
7. Click **All Sources** to reveal the funds available.





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

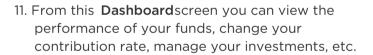
Once you are satisfied with your choices and your total at the bottom of the page equals 100%, click **NEXT.** 



9. Review all entries. Make any changes using the Edit buttons

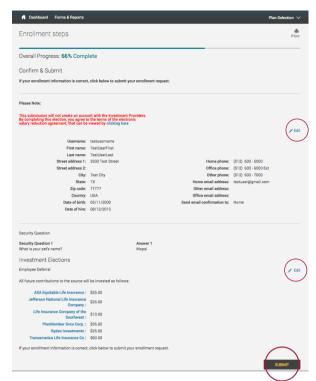
Click **SUBMIT** when you are satisfied.

10. Well done! You are finished! Your six-digit Confirmation Number will be emailed to you.

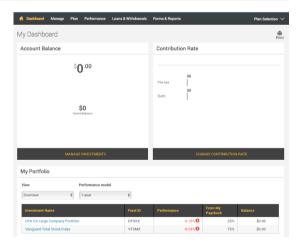


Scroll down to see your chosen investments, fund ID, performance, paycheck deductions and balance.

(The two funds shown are examples only.)









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### **Disclosures:**

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