

Exciting Changes Regarding Your Voluntary 403(b) and/or 457(b) Retirement Plan

The 403(b) and/or 457(b) Plan(s) offered by your Employer are valuable retirement savings options. Your employer has utilized the services of a Third Party Administrator (TPA) to keep the Plan(s) in compliance with state and federal rules and regulations. Envoy Plan Services (Envoy) is proud to be the TPA of these programs offered by your Employer.

Envoy has implemented some exciting changes to the services we provide that we want you to be aware of. Beginning **January 1, 2019**, the transaction/distribution and salary reduction agreement (SRA) servicing will be handled by a company that Envoy has partnered with. This new company is TSA Consulting Group (TSACG). Please refer to the list below for a review of the program including the enhancements being made available to you.

Distribution/Transaction Requests

Envoy/TSACG, utilizing an advanced Web-based system for plan participants and/or their advisors, can now submit all distribution/transaction requests by uploading the forms to our website and gain immediate approval certification for eligible requests. In addition, as long as you provide your email address on the forms submitted, we will send you an email once the request has been received and again when the request has been approved.

- Distributions from the Plan include: loans, transfers, rollovers, contract exchanges, and all other distributions.
- All distribution requests must be sent to Envoy/TSACG for approval prior to submission to your provider for processing.
- If you are transferring and closing your 403(b) account, YOU MUST submit a new SRA to stop or change your payroll deduction salary deferral contributions, or your payroll deductions will not stop.
- We encourage you to submit your transaction/distribution request online to Envoy/TSACG for approval, follow the steps below:

Online:

On or after January 1, 2019, go to Envoy's website at www.envoyplanservices.com and Click on the **Online Distributions button. This user-friendly system will guide you through a series of questions designed to help you obtain immediate approval certification. If your request is not eligible for immediate approval, the system will guide you through the process of submitting your distribution documents for further review.**

Salary Reduction Agreement (SRA) Submissions

- Go to Envoy's website at www.envoyplanservices.com
- Click on Client Center, then Click on your State, County and Employer.
- Locate the provider of your choice from the list on your Employers web page on our website at www.envoyplanservices.com.

Step 1 To Enroll in the 403(b)/457(b) Plan(s)

- Locate the provider of your choice from the list on your Employer's home page
- Contact information is listed for each approved provider.
- Contact the provider directly, or through your advisor if you already have one, to request enrollment forms and instruction.
- Work directly with your provider, or advisor, to complete their enrollment process (Envoy Plan Services will not accept Provider enrollment forms).

Step 2 Establish or Revise a Salary Reduction Agreement (SRA)

- After you have established your 403(b) and/or 457(b) account, you will need to submit a completed SRA to begin or revise your payroll deduction contributions.
- We encourage you to submit your SRA request online to Envoy/TSACG for approval, follow the steps below:

Online:

On or after January 1, 2019, go to Envoy's website at www.envoyplanservices.com and Click on the **Online SRA** button. This user-friendly system will guide you through the process of submitting a new Salary Reduction Agreement or amending an existing Salary Reduction Agreement.

If you prefer to submit your Transaction/Distribution requests or SRA via mail or fax below is our contact information.

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c/o TSACG
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