

Brookfield Public Schools

We are excited to announce **The OMNI Group** as our 403(b) Third Party Plan Administrator!

In partnership with Brookfield Public Schools, OMNI will ensure that the district, the employee participants, and each of our investment providers and their agents adhere to the many compliance regulations mandated by the Internal Revenue Service.

OMNI's services include the review and approval of any and all 403(b) transactions, as well as the implementation of Salary Reduction Agreement (SRA) forms. Refer to the instructions on the following pages to submit an SRA or any of the following transactions.

- Distribution (including distributions due to age, death, disability, separation from service, and domestic relations orders).
- Exchanges/Transfer/Rollover of 403(b) funds between vendors or 403(b) plans
- Hardship distribution
- Loans
- Purchase of Service Credits

In the event that you wish to make a change to your 403(b) benefit, 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 service provider.

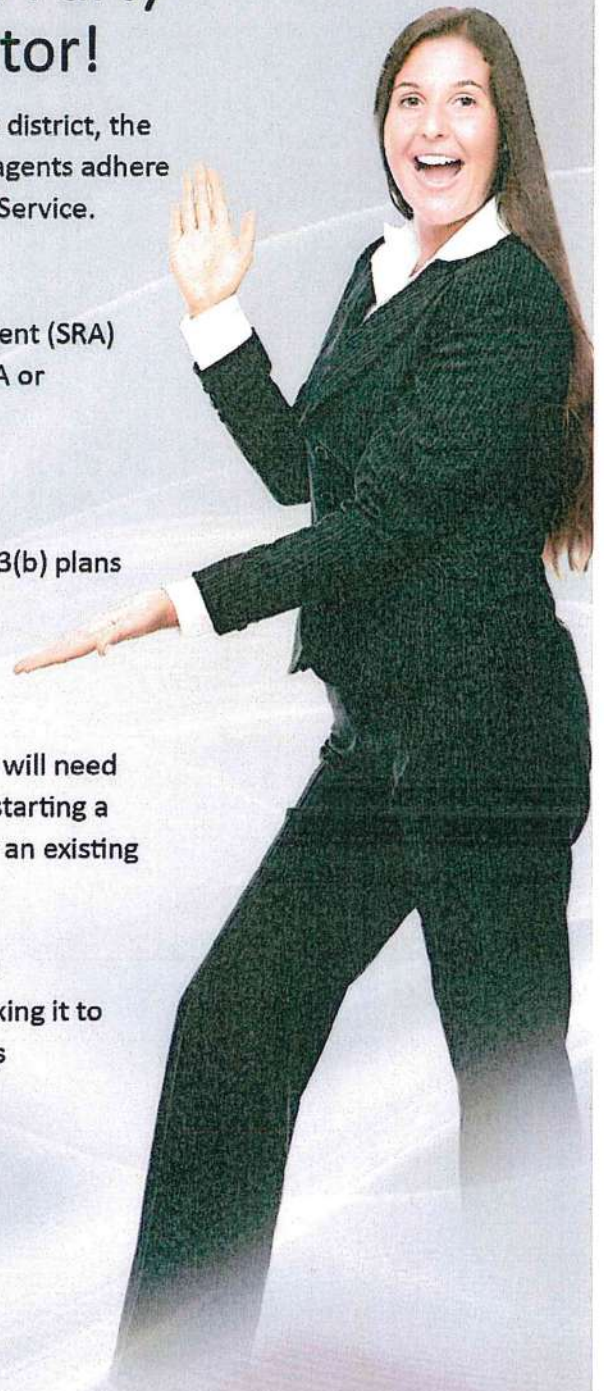
The SRA form can be found in the "Forms" section of OMNI's website at www.omni403b.com. You have the option of printing out a form and faxing it to OMNI or completing the form electronically on their secure website. It is suggested that you complete the electronic SRA form to expedite your request.

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



Follow us for daily 403(b) information.



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You have now reached the Brookfield Public School webpage where you will find the following information:

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

Please note: If you are currently contributing to multiple investment providers, please be sure to list all contributions you wish to continue on the new SRA. Any current 403(b) or ROTH 403(b) contributions not listed on the new SRA will be discontinued.

The screenshot shows the OMNI Online Secure Portal interface. At the top, there is a navigation bar with links for Home, Forms, About Us, Leadership, Services, News, and Contact Us. The main content area is titled "Plan Details" and "Organization Name". Below this, there are four numbered sections:

- 1 Plan Features:** Lists options like "Disable Employees", "Employer Non-Elective Contributions", "Loans", "Financial Hardship Distribution", "Transfers Into Plan", "Transfers Out of Plan", "Rollover Contributions", "Contract Exchanges", and "Distributions".
- 2 Participating Service Providers:** Lists approved providers such as AXA Equitable Life Insurance Company, FTJ Fundsource, Inc., PlanMember Services Corp., RiverSource Life Insurance Co of NY, ROTH - Legends Group/ADSERV, The Legend Group/ADSERV, and Voya Financial (VIA Nutt NY).
- 3 Forms:** Lists forms like Salary Reduction Agreement (SRA), Salary Reduction Agreement - Online, Salary Reduction Agreement - PDF, Service Based Catch-Up Request, Online Request Form, and Downloadable PDF Version.
- 4 Service Provider Transactions:** Lists transactions like Death Claim, Disability, Distribution, Exchange, Hardship, Loan, GDRD, Rollover, Service Credit, and Transfer.

New accounts may be opened with following approved service providers

- Ameriprise Financial Services, Inc.
- AXA Equitable Life Insurance Company
- MetLife (FC)
- Voya Financial (ILIAC)

Check us out on Social Media!

OMNI recently updated our Facebook, Twitter and LinkedIn pages and we encourage you to like our Facebook page "OMNI 403b" and follow us on Twitter "@omni403b". Our content will have helpful information for retirement planning. Additionally we will be posting company updates and newsletters along with contests and prizes.



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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:



On the same page, in the lower left-hand corner begin entering the Employer Name. Note that when you begin typing the name, a dropdown box will appear where you can select your organization's name.

