

We are excited to announce **U.S. OMNI** as our **403(b) & 457(b) Third Party Plan Administrator!**

In partnership with **Marin Community College District**, 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.

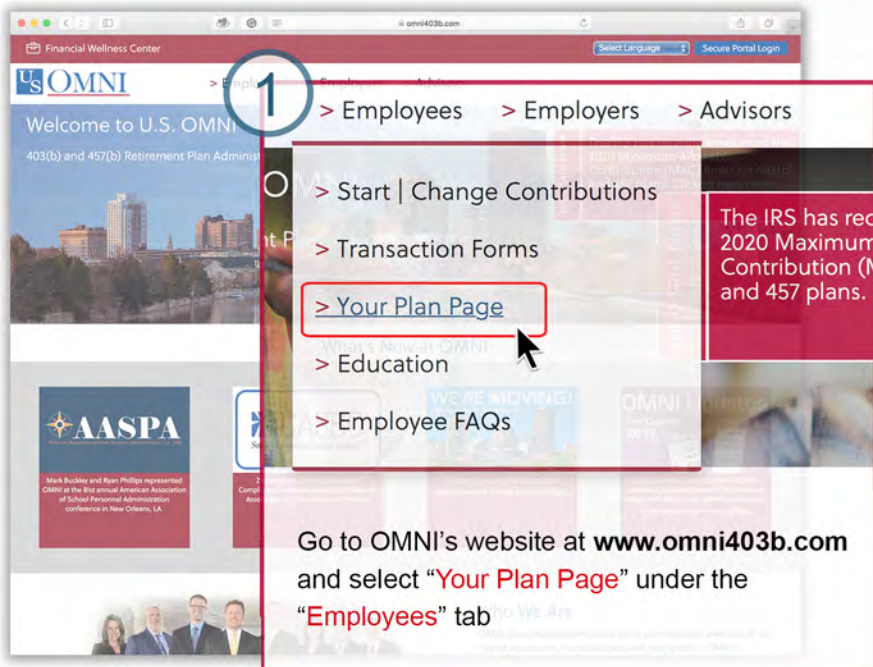
\*Transactions permitted by plan may vary

- > 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)





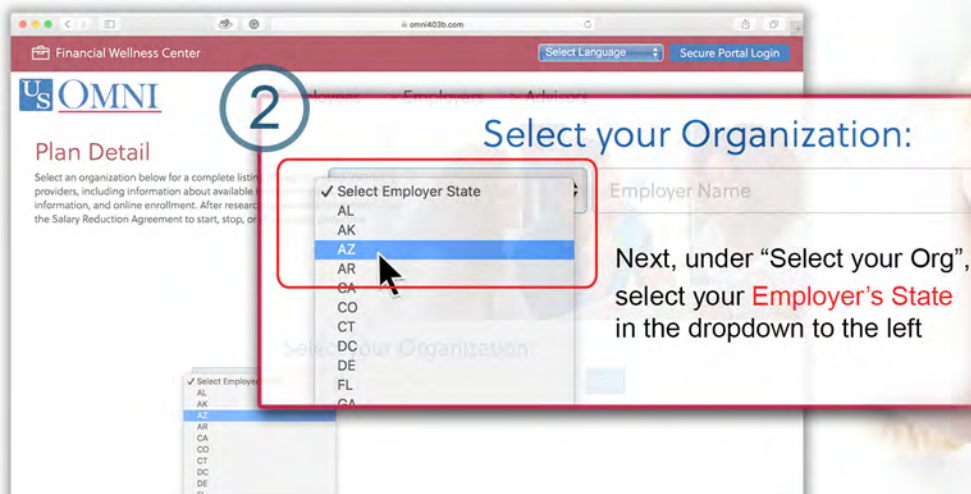
Specific plan information is available on OMNI's website at [www.omni403b.com](http://www.omni403b.com).  
This information can be viewed by following the steps below:



1 > Employees > Employers > Advisors

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

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:

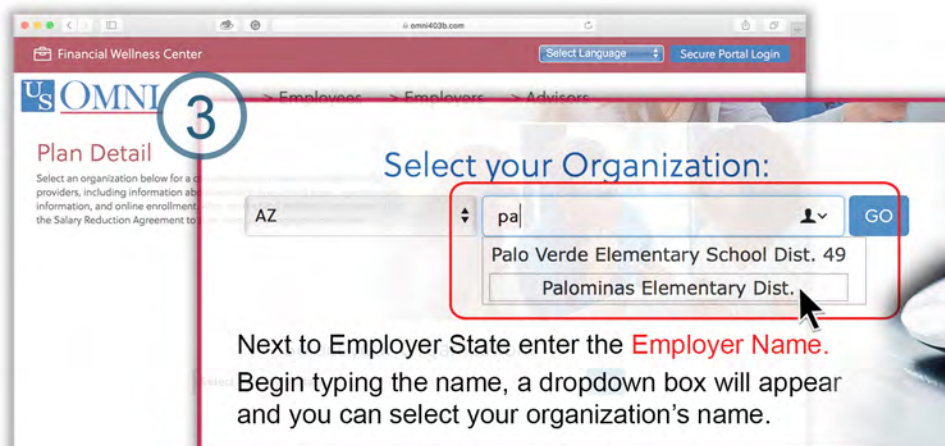
Select an organization below for a complete list of providers, including information about available information, and online enrollment to start, stop, or

✓ Select Employer State

- AL
- AK
- AZ**
- AR
- CA
- CO
- CT
- DC
- DE
- FL
- GA

Employer Name

Next, under "Select your Org", select your **Employer's State** in the dropdown to the left



3 Select your Organization:

Select an organization below for a complete list of providers, including information about available information, and online enrollment to start, stop, or

AZ

pa

Palo Verde Elementary School Dist. 49

Palominas Elementary Dist.

GO

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 **Marin Community College District** 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.

➡ **To access 457(b) Plan Details click on 457(b) Plan tab.**

**Financial Wellness Center** | Select Language | Secure Portal Login

**us OMNI** > Employees > Employers > Advisors

### Plan Detail

Below is a complete listing of your available 403(b)/457(b) providers, including information about their available investment types, agent contact information, and online enrollment. In addition, you will find a Salary Reduction Agreement to start, stop, or change your deduction, as well as forms to request a transaction.

**Plan Details for** Your District Name

**403(b)** **457(b)**

Current Status: Active

### 2 OMNI Participating Investment Providers

Investment Types: Fixed Annuity (F) Fixed Index Annuity (FI) Variable Annuity (VA) Investment Advisory Service (RIA) Mutual Funds (MF)

| Provider                                    | F | FI | VA | RIA | MF | Phone          |
|---|---|----|----|-----|----|----------------|
| AIG Retirement Services (formerly VALIC)    |   |    |    |     |    | 1-888-569-7055 |
| AXA Equitable Life Insurance Company        |   |    |    |     |    | 1-800-628-6673 |
| Brighthouse Life Ins (MetLife CT/Travelers) |   |    |    |     |    | 1-800-423-4026 |
| Foresters Financial (First Investors)       |   |    |    |     |    | 1-609-653-0181 |
| MetLife                                     |   |    |    |     |    |                |
| MetLife (FC)                                |   |    |    |     |    |                |
| Siracusa Benefits Programs                  |   |    |    |     |    |                |

Click Icons for Details: Online Enrollment Available Agent Contact Information Available Additional Information Available Upon Request

For any questions concerning your employers list of participating providers, please contact our Customer Care Team at 1.877.544.OMNI (6664).

### 4 Plan Features

| Feature   | Available  |
|---|--|
| <b>Eligible Employees</b>   |  |
| All Employees   | Available  |
| <b>Employer Non-Elective Contributions</b>  |  |
| Available   | Available  |
| <b>Loans</b>  |  |
| Available for qualified applicants  | Available  |
| <b>Financial Hardship Distribution</b>  |  |
| Available for qualified applicants  | Available  |
| <b>Transfers Into Plan</b><br>(A transfer of assets from one employer's 403(b) plan to another)   | Not Available  |
| <b>Transfers Out of Plan</b><br>(A transfer of assets from one employer's 403(b) plan to another)   | Not Available  |
| <b>Service Based Catch-up</b><br>(Permits eligible employees with a given number of years of service to contribute additional money to their 403(b) beyond their base limit. See form for details and limit amounts.) | Available  |
| <b>Rollover Contributions</b><br>(A contribution of a distribution from another plan (i.e. 401(k), 457, IRA))   | Available  |
| <b>Please call to inquire</b>   | Available  |
| <b>ROTH 403(b)</b>  | Not Available  |
| <b>Contract Exchanges</b><br>(A change of investment within a 403(b) plan)  | Available. Please note that a new investment provider must be participating in your Employer's 403(b) plan (see list above). |
| <b>Distributions</b><br>(i.e. Separation from Service, Attainment of 59 1/2 years of age, Permanent Disability, or Death)   | Available  |

## APPROVED 403(b) PROVIDERS

AIG Retirement Services (formerly VALIC)  
American Century Services LLC  
American Fidelity Assurance Co.  
American Funds Service Company  
American United Life Ins Co. 1  
Americo Financial Life/Annuity  
Ameriprise Financial/RiverSource  
Brighthouse Life Ins (MetLife CT/Travelers)  
California Teachers Association (CTA)  
CalSTRS Pension 2 (VOYA)  
Equitable (formerly AXA)  
Fidelity Management Trust  
Fiduciary Trust Intl-Franklin Templeton  
Global Atlantic Financial Group  
GLP & Associates  
GVN/Employee Deposit Acct  
Horace Mann Life Ins. Co.  
Industrial Alliance Ins & Fin. Serv. Inc  
Invesco OppenheimerFunds  
Jackson National Life III  
Lincoln Investment Planning  
Lincoln National  
MetLife  
Midland National Life Insurance  
Modern Woodmen of America  
National Life Group (LSW)  
North American Company 2  
NY Life Ins. & Annuity Corp.  
Orion Portfolio Solutions, LLC (Formerly FTJ FundChoice)  
Pacific Life Insurance Company  
PenServ SmartSAV (formerly Foresters)  
PFS Investments  
PlanMember Services Corp.

Putnam Investments  
ROTH - AIG Retirement Services (formerly VALIC)  
ROTH - American Century Services LLC  
ROTH - CalSTRS Pension 2 (VOYA)  
ROTH - Equitable (formerly AXA)  
ROTH - Fidelity Management Trust  
ROTH - Horace Mann Life Ins. Co.  
ROTH - Industrial Alliance Pacific  
ROTH - Invesco OppenheimerFunds  
ROTH - Lincoln Investment  
ROTH - MetLife  
ROTH - National Life Group (LSW)  
ROTH - Orion Portfolio Solutions, LLC (Formerly FTJ FundChoice)  
ROTH - PenServ SmartSAV (formerly Foresters)  
ROTH - PlanMember Services Corp.  
ROTH - Primerica Financial Services  
ROTH - Security Benefit  
ROTH - The Legend Group, A Lincoln Investment Company  
ROTH - Vanguard Fiduciary Trust Co.  
ROTH - Voya Financial (Reliastar)  
Security Benefit  
The Legend Group, A Lincoln Investment Company  
Thrivent Financial for Lutherans  
TIAA-CREF  
Transamerica Fund Services, Inc. - 403(b)  
Vanguard Fiduciary Trust Co.  
Voya Financial (Reliastar)  
Waddell & Reed Inc.  
Western National (AIG) - 1

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.

Great American Insurance Group  
Mass Mutual VA  
ROTH - Great American  
USAA Life Insurance Co.  
Victory Capital (USAA Mutual Funds)

## APPROVED 457(b) PROVIDERS

AIG Retirement Services (formerly VALIC) - 457  
CalSTRS Pension 2 (VOYA) - 457  
National Life Group (LSW) - 457  
ROTH - AIG Retirement Services (formerly VALIC) - 457  
ROTH - CalSTRS Pension 2 (VOYA) - 457  
ROTH - National Life Group (LSW) - 457  
ROTH - Security Benefit - 457  
Security Benefit - 457