

Approved 403(b) Vendors

American Century Services, LLC
American Fidelity Assurance Co.
Ameriprise Financial Services, Inc.
AXA Equitable Life Insurance Company
Franklin Templeton Funds
Great American Insurance Group
Horace Mann Life Ins. Co.
MetLife
Oppenheimer Shareholder Services
Pacific Life Insurance Company
T. Rowe Price Trust Company
VALIC
Vanguard Fiduciary Trust Co.
Voya Financial (ILIAC)

403B Third Party Administrator

OMNI Group
1-877-544-6664

www.omni403b.com For forms to start, stop, or change your payroll contribution amount, click on “Employees”, select “Start/Change Contributions”, then enter our state and district name in the box in the middle of the screen.

Instructions to start a new 403(b) account

1. First you'll need to establish an account with any one of the approved vendors on this list. Tell them that you would like to open an account under the Rogue River School District's 403b plan. You can establish an account with the vendors by either calling them, going to their website, or using a local investment broker.
2. We use The OMNI Group to administer our group plan. They handle all of the paperwork, and make sure that all transactions are in compliance with IRS regulations and annual limits. Once you have an account established with the vendor of your choice, you'll need to go to www.omni403b.com to fill out a **"Salary Reduction Agreement"** form. (This is the form that lets me know how much you'd like to contribute each month.)

The forms can be found by clicking on the “Employees” tab, then select “Start/Change Contributions”. Enter our state and school district name in the box in the middle of the screen. Then select one of the form versions to fill out. You can either fill out the online form, or print one out and fax it to The Omni Group. Once they receive your form, they'll send me a notification to begin payroll deductions.

The Omni website also has a little bit of information about the types of investments offered by some of our approved vendors, along with phone numbers or website links for some of them, so this page is a good starting point in deciding which vendor to invest with. Go to “Employees”, then “Your plan page”, then enter our state and district name to get started.