

How to Change Investment Option Allocations



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Important Information — Read This First!

How Are My Contributions Allocated Now?

To see how your contributions are currently allocated, go to **LOG INTO YOUR ACCOUNT**.

You can invest your contributions among one or more of your plan's approved investment providers. The portion of your contribution you direct to an investment provider is then allocated to that provider's investment option(s) as you have directed.

Why Change My Investment Provider Allocations?

- You may not be satisfied with the level of service you receive from your current investment provider.
- You may not be happy with your current investment provider's investment options or their performance.
- You may want to consolidate your investment accounts.
- Your current investment provider may not offer a feature you want, such as the ability to borrow from your account.

What Should I Consider Before Changing My Allocations?

- Do you have a contract with the investment provider to whom you want to allocate your contributions? If not, contact the investment provider. **You must have a contract with an investment provider in order to allocate your contributions to that provider.**
- What are the terms and conditions for this transaction? **CLICK HERE** to view the terms and conditions.

About This Guide

This "How to..." guide describes the most important steps needed to complete certain transactions using the PlanConnect® web site. Note that the web site may have changed since this guide was issued. If you have any questions about the guide or the information herein, please contact PlanConnect® using the contact information located on the last page.

The examples appearing in the guide are for illustrative purposes only; the information you will see will differ.

Changing Your Investment Allocations

Step 1: Connect to PlanConnect®

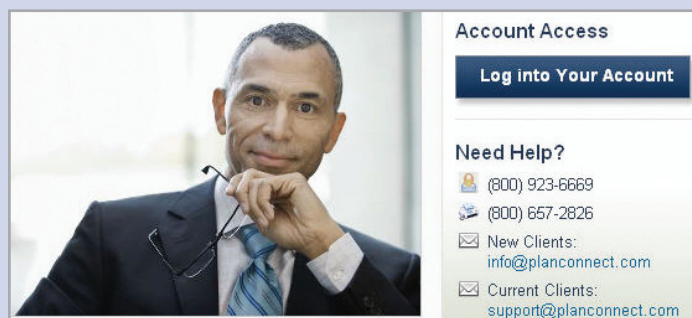
Go to the PlanConnect® Web Site

1. Open your web browser and go to www.planconnect.com.¹
2. Click on **LOG INTO YOUR ACCOUNT**.
3. The log-in window will open.

Log In to Your Account

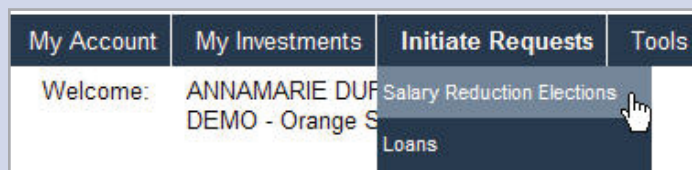
1. Enter your User ID.
If this is the first time you're logging in, you will be using your Social Security number.
2. Enter your Password.
If this is the first time you're logging in, use your date of birth in mmddyyyy order.
(e.g., July 20, 1987 would be 07201987.)
3. In the drop-down menu labeled "Select Role," verify **PARTICIPANT** is selected.
4. Click on the **LOGIN** button.

¹ This application is written to work with Firefox 2.0+, Internet Explorer 6.0+ and Safari 3.0+. While this application should work with browsers from Firefox or Internet Explorer that are within this version range, there may be versions designed specifically for AOL or Macintosh which may encounter problems with some JavaScript used in this site. Problems experienced with these browsers should be considered bugs in these browsers. You may contact your browser distributor about the problem. AOL subscribers may opt to use Internet Explorer or Firefox directly instead of going through the AOL browser. New devices such as wireless telephones, personal digital assistants, etc which are Internet accessible may not have browsers capable of properly navigating this site.

A screenshot of the PlanConnect login form. The form is titled "1 Login" in a red box. It has four numbered steps: "2 User Id:" with a text input field, "3 Password:" with a text input field, and "4 Select Role:" with a dropdown menu showing "Participant". Below these fields is a "Login" button. At the bottom, there is a note: "Note: Both entries are case sensitive. If you fail to login three consecutive times your account could be disabled."

Step 2: Start Your Transaction

1. Click on the **INITIATE REQUESTS** tab.
2. From the drop-down menu that appears, select **SALARY REDUCTION ELECTIONS**. The “Salary Reduction Elections Change” window opens.
3. A link is provided to open up a fill-able PDF version of the Salary Reduction Agreement (SRA) form. Click on this link.



Step 3: Enter Your Transaction Details

1. In Section 1, enter your personal information including:
 - Effective date for the change
 - Payroll frequency
 - Whether you contribute to another employer's voluntary retirement plan
2. In Section 2, indicate the type of request you wish to process:
 - **BEGIN** or **RESUME** contributions
 - CHANGE future contribution **AMOUNTS** and/or **INVESTMENT PROVIDER(S)**
 - **TERMINATE** participation
3. In Section 3, enter:
 - The new Investment Provider allocations or
 - Both a new amount to be deducted from your paycheck each pay period **AND** new Investment Provider allocations
 - For assistance in determining how much to contribute and the impact it can have on your paycheck and your retirement savings, go to [retirement income](#).
4. Use your browser's “print” function to print the SRA.

Salary Reduction Elections Change	
Contribution Type	Current Contribution
Pre-Tax Deferral	\$100.00 per pay period

If you need help determining what your contribution amount should be:

- Use our retirement calculators and learn more information by clicking [Planning for Retirement](#).
- View the IRS limits by selecting [403\(b\) Plan limits](#).

INSTRUCTIONS:

Please submit a new Salary Reduction Agreement (SRA) to:

- BEGIN or RESUME contributions
- CHANGE future contribution AMOUNTS and/or INVESTMENT PROVIDER(S)
- TERMINATE participation

Please click [here](#) to access the form.

You can complete the form online before printing it.

Step 4: Complete Your Transaction

Verify the Transaction You've Requested

1. Read the **TERMS AND CONDITIONS** provided on page 4 of the form.
2. Verify that all information you entered is correct.
3. Sign the form and submit the form to PlanConnect®.

Print the Revised Salary Reduction Agreement

1. Once PlanConnect® has received and processed the request, you will receive an email confirmation that your request was processed and a Salary Reduction Agreement confirmation will be generated to the PlanConnect® web site.

If you would like a paper copy for your records, please follow the instructions below:

2. To view/print the revised Salary Reduction Agreement from your online account, click on the **TOOLS** tab.
3. From the drop-down menu that appears, select **REPORTS**. The "Reports" window will open.
4. Click on **403(b) SALARY REDUCTION AGREEMENT** with the applicable date, or the Adobe icon in the left-hand column next to it.*
5. Print out a copy of the revised Salary Reduction Agreement and retain for your records.

To view a sample Salary Reduction Agreement [click here](#).

* You will need the free Adobe Acrobat Reader to view/print the Agreement. Acrobat Reader can be downloaded [here](#).

Remit Contributions To:	I have a TSA Account with this provider:	Percent to Investment Provider:	Amount to Investment Provider	Contribution Source (i.e. Salary Deferral, 403(b) Roth or Post Tax):
Investment Provider Name	<input type="checkbox"/> Yes <input type="checkbox"/> No	%	\$	Source
Investment Provider Name	<input type="checkbox"/> Yes <input type="checkbox"/> No	%	\$	Source
Investment Provider Name	<input type="checkbox"/> Yes <input type="checkbox"/> No	%	\$	Source

Initiate Requests	Tools	My Profile
School District 403	Reports	
ner in managing yo	Payroll File History	
	Web Request History	

	PlanConnect SRA 403(b)
	PlanConnect SRA 403(b)

4. SIGNATURES	
Employee Signature:	Date:
Authorized Employer Signature:	Date:
Title:	

Need Additional Help?

Need help with your request? Call us at 800-923-6669 9:00 a.m. – 5:00 p.m. Eastern Time.

To Contact PlanConnect®

Find us on the web at:
www.planconnect.com

Email us at:
support@planconnect.com

Call us at:
800-923-6669

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