FIRST





## Making Changes to your Retirement Plan Deferral Online

You an submit an a just your 403 b, Roth 403 b or 457 b eferral by a essing your retirement plan online. By a essing your plan online, you get



## Accessing Plan Vue

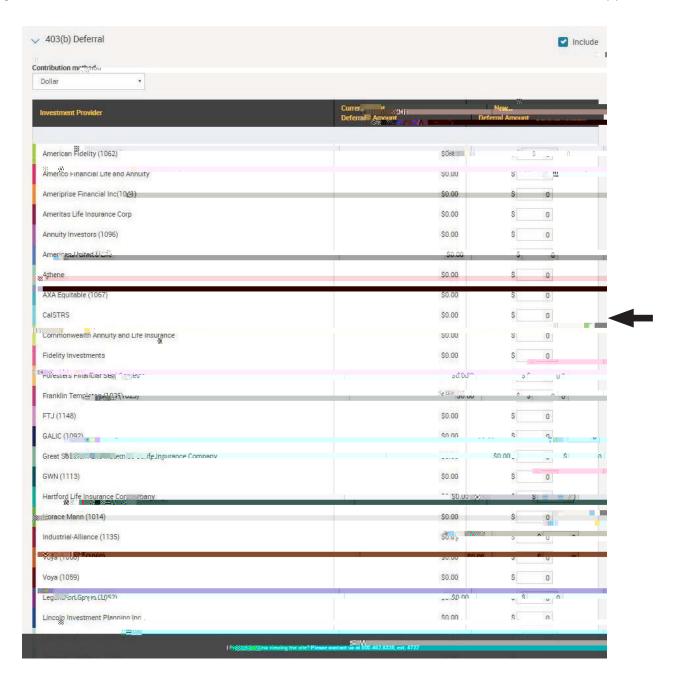
Follow these step-by-step instru tions to make hanges to your retirement ontribution:

1. Click the **Salary Re u tion Change** tab located at the top of the page. You can start deferrals, change





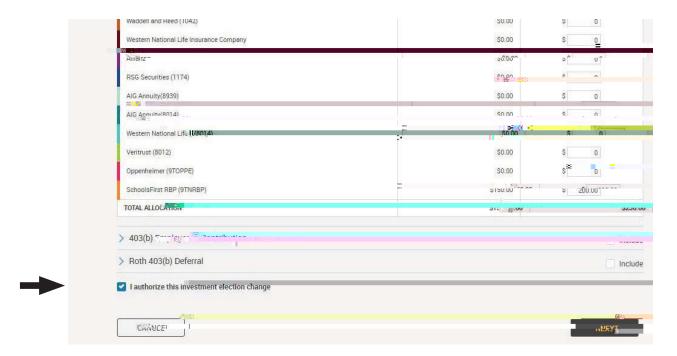
- 7. Enter your deferral amount in the **New Deferral Amount** column. Find the box that corresponds with your investment provider and enter the amount there.
  - If you wish to continue an existing deferral to a vendor, and are adding or changing another vendor, you will need to re-enter the amount you are keeping in the box that corresponds with that vendor.
  - If you do not, the deferral to that vendor will be cancelled. (Note: must retain ER & Roth if applicable)



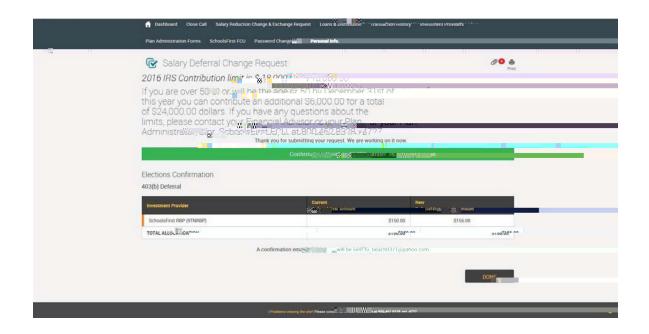
- 8. Ensure that your total allocation amount in the **New Deferral Amount** column matches the full amount you are electing to defer inclusive of all investment providers for that plan type.
- 9. Click the 'I authorize this investment election change' box in order to authorize your elections and click next to proceed to the con rmation page.



10. Review your Current and New Deferral Amount(s) for accuracy. If they are correct, click "Next".



- 11. A con rmation number will appear when the system has nalized your request. A copy will be stored for you and can be accessed via the **Plan Summary** page under **Transa tion Confirmations**, should you need it in the future.
- 12. Click done to complete the process.





## Important information to note about your eferral ele tions:

- An account must be established with the investment provider prior to completing this process.
- Deferrals sent to an investment provider without an active account will result in a returned contribution.
- Salary deferral requests must be submitted 30 days before the e ective date for your districts payroll cycle.
- If your request is not submitted in time to make the change requested for the current pay cycle, it will be e ective for the following pay cycle.
- Online salary deferral changes are submitted to your district the following business day. Your changes will be applicable for the next available date.
- The change submitted online will supersede any instructions that you currently have on le.
- If multiple changes for the plan are submitted on the same day, the last entry will be considered the requested change.
- If you wish to continue an existing deferral to a vendor, and are adding or changing another vendor, you will need to enter the vendor and amount you are retaining. If you do not, the deferral to that vendor will be cancelled.
- If you want to have different amounts for future payroll deferrals, you will need to submit a change during each deferral period or submit the SRA with a future date. The PlanVue ™ system does not allow future dated requests.

