

# Fax

To: Retirement Plan Administration  
Fax: 714.258.4262  
Phone: 800.462.8328 x4727

From:  
Fax:  
Phone:

Date:

Total Pages, Including Cover:

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## **Processing Expectations:**

Paper SRAs can take up to 5-business days to transmit to your school district. For faster processing, complete your SRA online log in at [pa.schoolsfirstfcu.org](https://pa.schoolsfirstfcu.org), online SRAs are transmitted to your school district the following business day.



# Your District Retirement Plan Online

## Access to your retirement plan has just become faster and more convenient.

- 24/7 access
- Ability to adjust your deferral amounts
- View your year-to-date summary
- View 403(b) & 457(b) plan limits

## How to log in to the SchoolsFirst FCU Plan Vue™ Plan Administration website:

- Go to [pa.schoolsfirstfcu.org](http://pa.schoolsfirstfcu.org)
- Enter your Social Security Number (no dashes) as your User ID
- Enter the last 4-digits of your Social Security Number as your Password
- Select the Employee role
- Answer the Alternate Verification Question
- Select a new User ID and Password, then confirm
- Update your email and phone number under the Personal Profile tab

EMAIL COMPLETED FORMS: [rpa@schoolsfirstfcu.org](mailto:rpa@schoolsfirstfcu.org) or FAX TO: 714.258.4262

## 1. Participant Information

First Name _____	Last Name _____	Social Security Number (REQUIRED) _____	Date of Birth _____	Date of Hire _____
Street Address _____	City _____	State _____	Zip Code _____	Phone Number _____
School District _____	County _____	<input type="checkbox"/> Certificated <input type="checkbox"/> Classified		
Employee ID (Required for LA Districts Only) _____	Participant Email Address _____			

## 2. Action

This agreement supersedes all prior Salary Reduction Agreements (SRA) on file, only the instructions identified below will be completed. SRAs must be submitted at least 30 days, but not more than 90 days, prior to the effective date. For your convenience, you may also make your deferral change online at [pa.schoolsfirstfcu.org](http://pa.schoolsfirstfcu.org).

**I WANT TO :**    BEGIN Contribution(s)     CHANGE Future Contribution(s)     CANCEL All Contributions

Effective date:    Next Available Pay Date     Future Pay Date \_\_\_\_\_

Investment Provider:	Dollar Amount
<input type="checkbox"/> SchoolsFirst FCU 457(b) DCP Share Certificate: Membership Number _____ Term (12, 36, 60)	\$ _____
<input type="checkbox"/> Nationwide Retirement Builder Plan (RBP) 457(b) <input type="checkbox"/> Pretax <input type="checkbox"/> Roth	\$ _____
<input type="checkbox"/> Other District Specific 457(b) _____ <input type="checkbox"/> Pretax <input type="checkbox"/> Roth	\$ _____
<b>Total Deduction Per Paycheck</b>	<b>\$ _____</b>

## 3. Financial Advisor/Agent Information

Financial Advisor/Agent Name _____	Financial Advisor/Agent Phone Number _____
Financial Advisor/Agent Email Address _____	<input type="checkbox"/> OK to contact my agent on my behalf

## 4. Signatures

**I understand and agree to the following:**

1. This Salary Reduction Agreement (Agreement) is an agreement between me and my employer that I have entered into voluntarily.
2. This Agreement supersedes and replaces all prior 457(b) Salary Reduction Agreements.
3. The Agreement is legally binding and irrevocable with respect to amounts paid or available while this agreement is in effect.
4. The Agreement may be terminated or modified at any time for amounts not yet paid or available.
5. Nothing herein shall affect the terms of my employment with the Employer.
6. This Agreement shall automatically terminate if my employment is terminated.
7. In accordance with IRC Section 457(b)(4), a salary reduction agreement must be signed, dated and received by SchoolsFirst Plan Administration for processing the calendar month prior to which you wish your deferrals to begin.

I authorize the automatic cancellation of this Salary Reduction Agreement in the event of any of the following: (1) if SchoolsFirst Plan Administration believes additional contributions will cause me to exceed limits under Code Section 457(b)(3), (2) if I take a hardship distribution, if available.

I have read and understand the information contained in this Agreement. I understand that by making this application the release of my confidential information to third parties may occur as necessary to administer the Plan in accordance with the Internal Revenue Code.

Participant Signature (REQUIRED) _____	Date _____
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