Salary Reduction Agreement Process

OMNI prides itself on providing full-service Salary Reduction Agreement (SRA) administration that includes direct submission of SRAs to OMNI, thereby alleviating the plan sponsor of this responsibility. SRAs can be completed online at OMNI's website at www.omni403b.com or by paper and sent via mail, facsimile, or e-mail. Our customer service team is available to assist employees in completing the forms and can be reached at (877)544-6664 Monday through Friday from 7:30 am – 8:00 pm EST.

Here's how it works

1. Your first step will be to contact a participating 403(b)/457(b) investment provider to establish your investment account. You can find a list of participating investment providers on the right of this page. More information for your employer is available on your organization's Plan Detail Page - **www.omni403b.com/PlanDetail**

2. You will then need to complete an OMNI Salary Reduction Agreement (SRA) to initiate your deductions. Go to **www.omni403b.com** and click on Employees. From the drop down menu choose Start I Change Contributions. Submit the form online or by completing a PDF copy to fax, email or mail the form.

3. OMNI verifies with the service provider(s) that the participant has an account open and ready to accept contributions.

4. OMNI sends the plan sponsor notice of the deduction change through the secure portal of our website.

5. OMNI receives the funds from the plan sponsor and validates the amount against the participant's most recent SRA, before remitting to the chosen service provider.

for more information visit our website at www.omni403b.com

*OMNI cannot provide advice concerning any particular service provider or investment vehicle. You may wish to consult with a financial advisor to determine which one(s) best meets your financial needs/goals.

New accounts may be opened with the following approved service providers:

- AIG Retirement Services (formerly VALIC)
- Ameriprise Financial/RiverSource
- Aspire Financial Services
- Brighthouse Life Ins (MetLife CT/Travelers)
- Equitable (formerly AXA)
- GWN/Employee Deposit Acct
- Invesco Oppenheimer Funds
- Lincoln Investment Planning
- MetLife
- Orion Portfolio Solutions, LLC (Formerly FTJ FundChoice)
- PenServ SmartSAV (formerly Foresters)
- Sgroi Financial LLC
- The Legend Group, A Lincoln Investment Company
- Voya Financial (Natl NY)
- New York State Deferred Comp Plan - 457