## 457(b) Plan Enrollment Instructions

## RECOMMENDED BROWSER FOR A PC IS INTERNET EXPLORER RECOMMENDED BROWSER FOR A MAC IS SAFARI

These are instructions for **first time users creating a 457(b) account** with Bastrop ISD. If you have a 457(b) account already in our system, please proceed to instructions for logging in with SSN and last four of SSN. If you have an FSA/HSA account, this log-in procedure is not the same. FSA/HSA accounts can be viewed at <u>www.region10rams.org</u>.



 From the navigation bar, select "B" then select "Bastrop."





NOTE: You must <u>CLICK</u> on the "Continue" button (you must manually click on the "Continue" button. Hitting "enter" on the keyboard will NOT allow you to properly move forward).



If the website states that "a user name and password already exists," then proceed with the following steps:

- A) Enter your Social Security Number as the username, and the last four of your social as the password
   For example: Social # 123-45-6789
   Username: 123456789
   Password: 6789
- B) If you are still unable to login, please call (800) 943-9179.



- **6.** Upon entering the site, you will move through five steps:
  - a. Personal Information
    - Enter your personal information and click "Save and Continue."

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Jem Jesource part	INERS				
Personal Information					
tems marked with an	asterisk (*) mu	ust be completed t	before you can	proceed to the next step.	
Personal B	eneficiaries	Contributions	Investment	Confirmation	
Information			Elections		
Username Informatio	n				
(alphanumeric digits	, case-sensitive	9)			
Establish your Pass (digits, case-sensitiv	word: e)				
Re-enter Password:					
Remember your Usern	ame and Pass	word. You will need	them to access	your account via the plan website in the future.	
In the quest that usu lo	co usur Bocou	and plagas satural		ur " act Password" unification question	
in the event that you to	se your nassw	ord, please set up i	the answer to yo	Verification Answer:	
Verification Question	h: Alternate pa	issword/quote	÷		
Your Personal Inform	ation				
First name:					
Last name:					
Date of Birth (mm/do	l/yyyy):				
Address Line 1:					
Address Line 2:					
City:					
State:				•	
Postal Code (Zip):					
Country:					
Home phone numbe	r:			( ) -	
Office phone numbe	r:			() - ex	
Other phone number	r.			( ) •	
If you would like to	receive confi	rmations of transa	actions, please	fill out the following information:	
<ul> <li>I do not have an</li> </ul>	e-mail address				
Send Email confirma	ation to:			None \$	
Home Email					
Office Email:					
Other Email:					
Be sure to continue	through all step	s of the enrollment	process until yo	ou receive confirmation that your enrollment is	
complete. If you can	cel or close yo	ur browser before c	ompleting the p	rocess, your enrollment will not be processed.	
Save And Continue				Cancer	_

esignate Your Benefic	ciaries					
						Barbers Hill 457
<u> </u>	2 -	3	)	(4)	5	
Personal Be Information	neficiaries	Contribu	tions Inv E	vestment Co lections	firmation	
proceed to the next displayed. Your data	step or re a will be s	turn to a prev aved when yo	rious step, cli su leave a form	ck on the name of m but your enrolln	the step in t nent will be c	the arrow and that form v complete only after you
ceive confirmation of	fyour cha	nges and sele	ect the Finish	button.		
his designation can hav	/e importai	nt tax and lega	l effects: you r	may wish to consult	your advisor	before continuing.
Add Additional Beneficiary						Previous Next Rep

- b. Beneficiaries
  - Click "Add Additional Beneficiary."
  - Enter in the Beneficiary information and click "Next."



- c. Contributions
  - Select your Action from the drop down box—either the Pretax or post-tax Roth contribution type.
  - Enter the contribution dollar amount per pay period.
  - Click "Next."

Please note that the contribution amount is the amount you want deducted from your paycheck EVERY pay period

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Enrollment Steps	/ly Account	Investments	Statements	Tools & Reports			
Contribution Lim	its						Barbers Hill 4
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$\bullet$ —	(2	り――		4	5		
Personal Information	Benefi	ciaries	Contributions	Investment Ele	ctions Confirm	nation	
Pre-Tax Deferral					\$0.00 p	er pay period	
Last web/vRU Contribution					\$0.00 p	er nev period	
Roth					\$0.00 p	er pay period	
V Change Comme	Amounts						Changes Pe
Please enter a contrib	oution percent	age of the second	mount that your	employer will deduct	from your compense	ation each payroll period fo	deposit to your account.
Please enter a contric							
Fules and Criteria							
Fules and Criteria	Action		Co	ontribution Type	Percent/Dona.	contribution	New Contribution Rate
Change	Action		Cc + Pr	e-Tax Deferral	Percent/Doma	Not contributing	New Contribution Rate

## d. Investment Elections

- Select the Source of Money in which to apply the allocation.
- Apply the percentage of your contribution to the investment of your choice.
- The elections must total 100%.
- Click "Next."

		Log Out 🔞 📥
JEEM JRESOURCE PARTNERS		
Enrollment Steps My Account Investments Statements Tools & Reports		
Select Investments	Ba	arbers Hill 457 Plan
Personal Information Beneficieries Contributions Investment Elections Confirmation		
The investment election percentages you enter below will be applied to the selected source of money. Please note that you can always change your investment election percentages. For more information, please contact your plan administ process.	once you have completed the e rator once you have completed	enrollment process, the enrollment
▼ Investment Elections		
Rules and Criteria	Prospectus O Investm	ent Product Details
+ Employee Pre-tax		
Investment	Current	New
RAMS Aggressive Growth 🕥	0.00%	0.00 %
RAMS Capital Preservation 🕥	0.00%	0.00 %
RAMS Conservative 🥥	0.00%	0.00 %
RAMS Growth 🕥	0.00%	0.00 %
RAMS Moderately Conservative 🕥	0.00%	0.00 %
RAMS Signature Portfolio 📀	0.00%	0.00 %
DFA Emerging Markets Value	0.00%	0.00 %
DFA Continental Small	0.00%	0.00 %
Harbor Bond Insti	0.00%	0.00 %
DFA Inti Smali Cap Value	0.00%	0.00 %
DFA Large Cap International	0.00%	0.00 %
DFA US Large Company Portfolio	0.00%	0.00 %
Vanguard Total Stock Index	0.00%	0.00 %
DFA US Large Value	0.00%	0.00 %
Vanguard Wellington	0.00%	0.00 %
Columbia Corporate Income Fund Y	0.00%	0.00 %
Met Life Stable Value Fund 🚨	0.00%	0.00 %
Victory Fund For Income	0.00%	0.00 %
Goldman Sachs Commodity Strategy	0.00%	0.00 %
DFA US Micro Cap	0.00%	0.00 %
DFA US Small Company	0.00%	0.00 %
DFA US Small Value	0.00%	0.00 %
Total allocation percent:	0.00%	0.00%
	Rese	Investment Elections
	Previous	lext Reset



- e. Confirmation
  - Please confirm that all information is correct, including your investment election, and click "Finish."

Congratulations, your 457(b) account has been created. Additionally, the contribution amount to be deducted from your paycheck will be communicated to your district.

Please call JEM Resource Partners with any questions or concerns to help you set up your account **(800) 943-9179.** 

Enrollment Steps My Account Investm	ents Statements	Tools & Reports		
Review and Confirm all of your Ent	ries			
<ul> <li>✓ — (2) —</li> </ul>	3		5	
Personal Information Beneficiaries	Contributions	Investment Election	s Confirmation	
Personal Information:				Edit
Usemame:				
Verification Question: Alternate password/quote			Verification Answer:	
First Name				
Last Name				
Date of Birth (mm/dd/yyyy)				
Address Line 1				
Address Line 2				
City				
State				
Postal Code (Zip)				
Country				
Home phone number			0 -	
Office phone number			() - ex	
Other phone number			0 -	
Send Email confirmation to:			None	
Home Email				
Office Email				
Other Email				
Salary Deferral Elections:				Ed
PRE-TAX CONTRIBUTIONS	0	educt \$0.00 each pay per	od.	
		eddor aoloo each pay per		
Beneficiary Designations:				Edi
IF YOU DO NOT DESIGNATE ANY BENEF YOUR DEATH.	FICIARIES, YOUR A	COUNT WILL BE DISTR	BUTED IN ACCORDANCE TO PLAN PROVISIONS I	N EVENT OF
investment Elections:				Ed
These investment elections will apply to elections percentages by source of contr	all sources of contrib	utions. Once you have con	pleted the enrollment process, you can always chang	e your investme
ciccicito percontageo oy course or cana	iberenta.			
If your enrollment information is correct.	click below to submit	your enrollment request		

