

457(b) Plan Enrollment Instructions

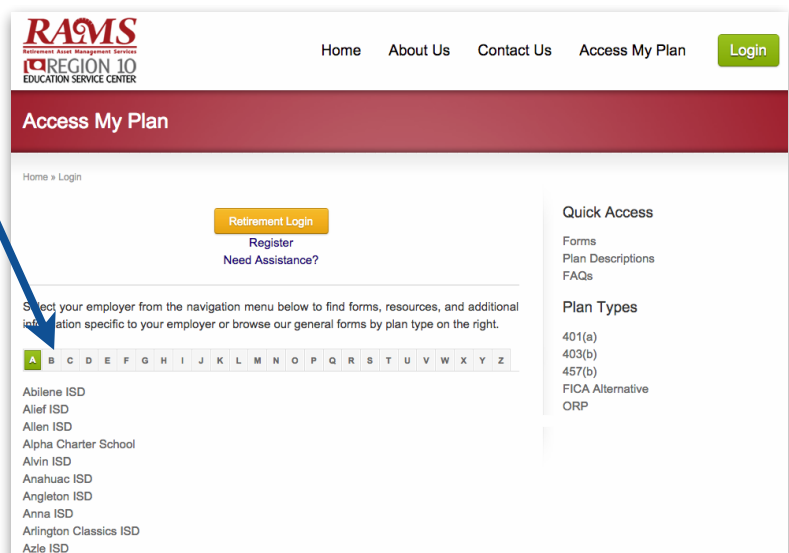
RECOMMENDED BROWSER FOR A PC IS INTERNET EXPLORER
RECOMMENDED BROWSER FOR A MAC IS SAFARI

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 www.region10rams.org.

1. Go to www.region10rams.org to set up your salary deferral (contribution amount) and allocation. Click on the green “Login” button at the upper right corner.

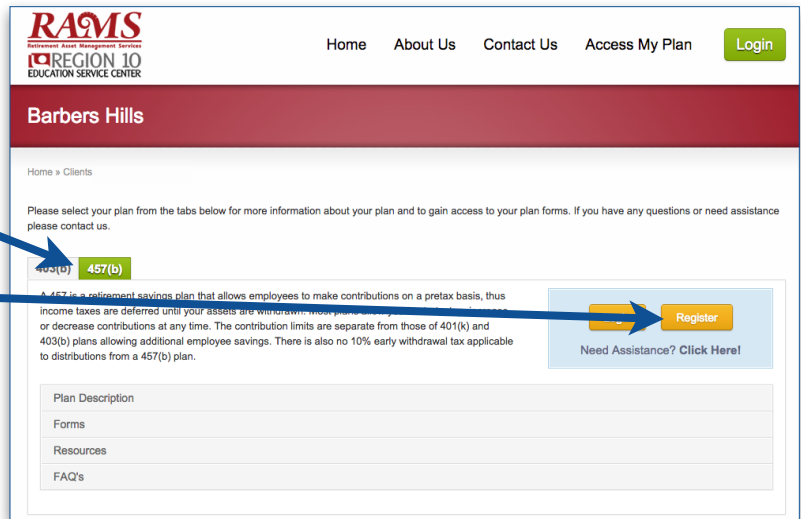


2. From the navigation bar, select “B” then select “Bastrop.”



3. Select the "457(b)" tab.

4. Select "Register."



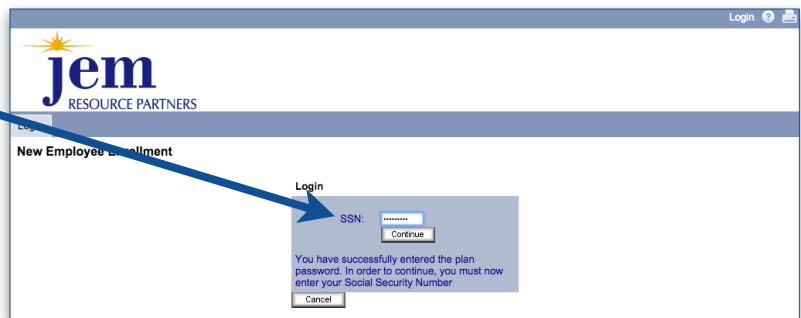
3. Enter the plan password **bastr457** (case sensitive).

4. Select "Begin."



5. Enter your Social Security Number (no dashes).

NOTE: You must **CLICK** 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.”**

The screenshot shows the 'Personal Information' step of the enrollment process. At the top, the Jem Resource Partners logo is visible. Below the logo, a progress bar indicates five steps: 1. Personal Information (selected), 2. Beneficiaries, 3. Contributions, 4. Investment Elections, and 5. Confirmation. A red warning message states: 'Items marked with an asterisk (*) must be completed before you can proceed to the next step.' The form fields include: Username Information (Establish your Username, Password, and Re-enter Password), a 'Remember your Username and Password' checkbox, a 'Lost Password' verification question and answer, and Your Personal Information (First name, Last name, Date of Birth, Address Line 1 and 2, City, State, Postal Code, and Country). There are also fields for Home, Office, and Other phone numbers. A section for email addresses includes a checkbox for 'I do not have an e-mail address' and a dropdown for 'Send Email confirmation to:'. At the bottom, there are 'Save And Continue' and 'Cancel' buttons.

b. Beneficiaries

- Click **“Add Additional Beneficiary.”**
- Enter in the Beneficiary information and click **“Next.”**

The screenshot shows the 'Designate Your Beneficiaries' step of the enrollment process. The Jem Resource Partners logo is at the top. A navigation bar includes 'Enrollment Steps', 'My Account', 'Investments', 'Statements', and 'Tools & Reports'. The current step is 'Designate Your Beneficiaries' for the 'Barbers Hill 457 Plan'. A progress bar shows five steps: 1. Personal Information (checked), 2. Beneficiaries (selected), 3. Contributions, 4. Investment Elections, and 5. Confirmation. A red warning message states: 'To proceed to the next step or return to a previous step, click on the name of the step in the arrow and that form will be displayed. Your data will be saved when you leave a form but your enrollment will be complete only after you receive confirmation of your changes and select the Finish button.' Below this, a note says: 'This designation can have important tax and legal effects: you may wish to consult your advisor before continuing.' At the bottom, there is an 'Add Additional Beneficiary' button and 'Previous', 'Next', and 'Reset' buttons.

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

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.”**

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.**

The screenshot shows the 'Review and Confirm all of your Entries' page in the JEM Resource Partners system. The page features a progress bar at the top with five steps: 1. Personal Information (checked), 2. Beneficiaries, 3. Contributions, 4. Investment Elections, and 5. Confirmation. The main content area is divided into several sections, each with an 'Edit' button:

- Personal Information:** Includes fields for Username, 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, Office phone number, Other phone number, and Send Email confirmation to: (Home Email, Office Email, Other Email).
- Salary Deferral Elections:** Includes PRE-TAX CONTRIBUTIONS (Deduct \$0.00 each pay period.) and ROTH 401(k) CONTRIBUTIONS (Deduct \$0.00 each pay period.).
- Beneficiary Designations:** Includes a warning: 'IF YOU DO NOT DESIGNATE ANY BENEFICIARIES, YOUR ACCOUNT WILL BE DISTRIBUTED IN ACCORDANCE TO PLAN PROVISIONS IN EVENT OF YOUR DEATH.'
- Investment Elections:** Includes a note: 'These investment elections will apply to all sources of contributions. Once you have completed the enrollment process, you can always change your investment elections percentages by source of contributions.'

At the bottom of the form, there is a 'Finish' button and a message: 'If your enrollment information is correct, click below to submit your enrollment request.' The progress bar at the bottom of the page is identical to the one at the top.