



## 403b and 457 Plan Approvals and Service Requests

### Employee and Advisor Transaction Approval Process

#### Option #1 (Preferred Method) - Online and/or Mobile Form

- 1) Go to [www.403bpartners.com](http://www.403bpartners.com)
- 2) Select Transaction Request or Salary Reduction-SRA
- 3) Select your Employer
- 4) Use the online form to request New SRA enrollments, changes, or any TPA transaction requiring authorization or approval (loans, hardships withdrawals, etc.)
  - No additional paperwork is needed for Salary Reduction Agreements (new enrollments, changes, etc.). If you have a vendor form, you can attach it. Please make sure to have an account established with your vendor.
  - You will need your vendor paperwork for Plan Transactions. Contact your vendor directly for the appropriate forms.
  - Make sure to upload a copy or picture of your vendor paperwork, then submit.
  - You will receive a confirmation email when complete. ***If you do not receive a confirmation email, we did not get it! Make sure the email is correct.***
- 5) Processing Steps once we receive your request(s)

#### For Salary Reduction Agreements:

403b Partners will forward your SRA plan request to your HR/Payroll department for processing. ***Make sure to have an account with the vendor you choose, otherwise contribution processing will be delayed.***

### For Plan transactions:

- 403b Partners (the plan administrator) will review your request and verify it prior to authorization.
- Once approved, we will forward approval certificate and all relevant documents to the Investment Provider for final processing. **A second confirmation email** will be sent once all information is approved and submitted to your investment provider.
- Please contact your financial company directly regarding the status of your request once you receive this second email. If we need additional information, we will contact you.

### **Option #2 - Manual remittance of paper forms**

#### **Salary Reduction Agreements**

- 1) Complete our standard SRA Agreement (available online or we can send via fax/email to you).
  - a. Some vendors have their own SRA Agreement. We will accept these as well.
- 2) Complete your vendor paperwork.
- 3) Send to 403b Partners using your preferred method:

Email: [Employeeplanservice@outlook.com](mailto:Employeeplanservice@outlook.com) Fax#: 770-799-8313

Physical address: 403b Partners  
5290 Matt Hwy, Ste# 165  
Cumming, GA 30028  
Phone # 770-799-8002

#### **Plan Transactions**

- 1) Speak to your vendor to obtain the appropriate forms.
- 2) Complete your vendor paperwork.
- 3) Send to 403b Partners using your preferred method:

Email: [Employeeplanservice@outlook.com](mailto:Employeeplanservice@outlook.com) Fax#: 770-799-8313

**Once we receive your SRA or Transaction paperwork, we will use the online system to enter your requests.**

**A confirmation email will be sent to you when completed.**