

SchoolsFirst FCU Plan Administration:

PlanVue™ Deferral Tutorial



Making Changes to your Retirement Plan Deferral Online

You can submit and adjust your 403(b), Roth 403(b) or 457(b) deferral by accessing your retirement plan online. By accessing your plan online, you get the following:

- 24/7 access
- The ability to adjust your deferral amounts
- Access to view your year-to-date deferral summary
- Access to view 403(b), Roth 403(b) and 457(b) plan limits

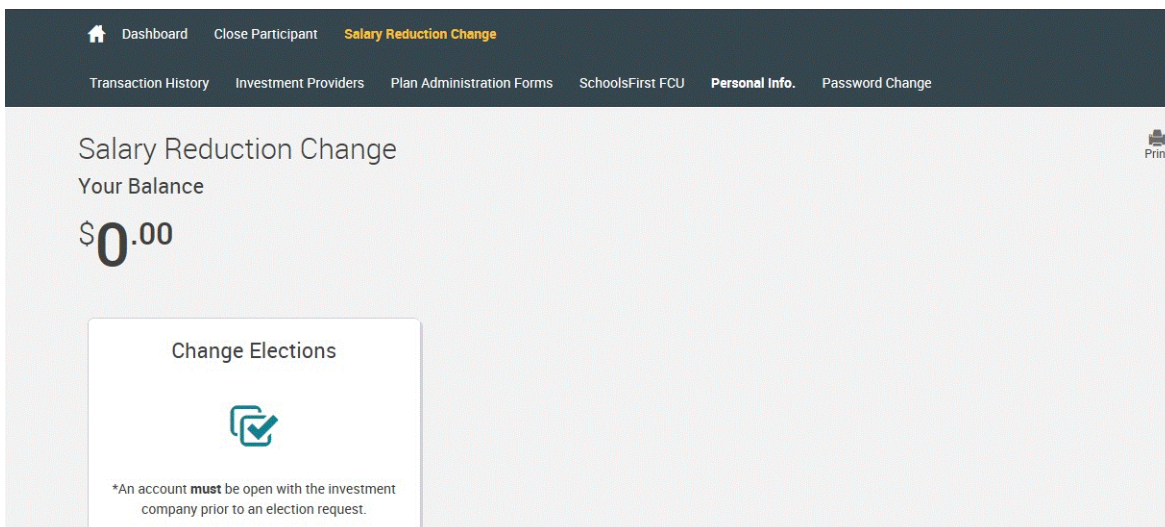
First time logging into the SchoolsFirst Plan Administration PlanVue™ website?

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

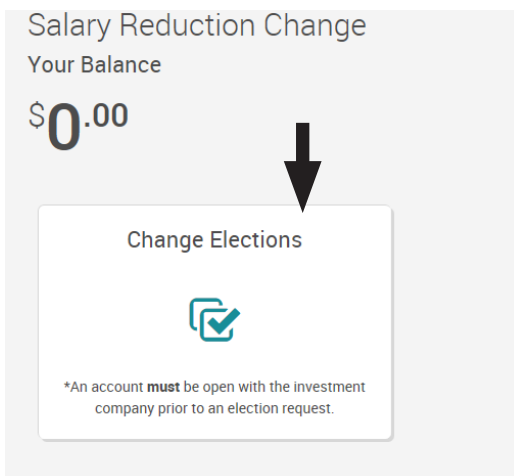
Accessing Plan Vue

Follow these step-by-step instructions to make changes to your retirement contribution:

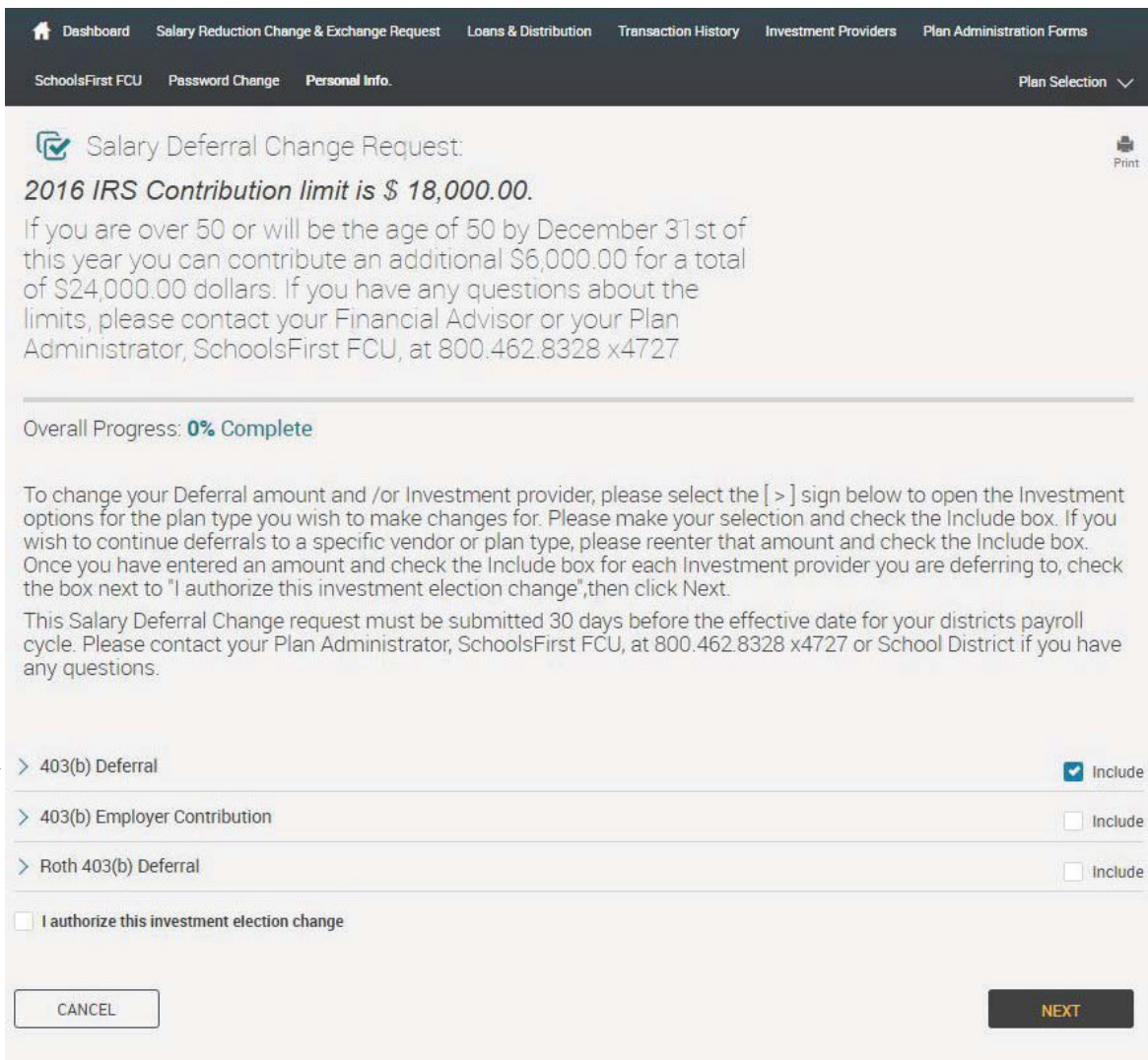
1. Click the **Salary Reduction Change** tab located at the top of the page. You can start deferrals, change your deferral amount/vendor, or terminate future deferrals. Once you click the tab, you will see the screen below:



2. Click on Change Elections





3. The next screen states **Salary Deferral Change Request** (shown below):
 - Click on the arrow to the left of the deferral type you would like to adjust. This will expand the list of eligible investment providers available through your district's plan.
 - Click on the "Include" box to the right to submit your change to the deferral type you selected.
4. Changes for more than one deferral type may be submitted at the same time, but the "Include" box must be checked or they will be skipped.



Dashboard Salary Reduction Change & Exchange Request Loans & Distribution Transaction History Investment Providers Plan Administration Forms

SchoolsFirst FCU Password Change Personal Info. Plan Selection

 Salary Deferral Change Request:  Print

2016 IRS Contribution limit is \$ 18,000.00.

If you are over 50 or will be the age of 50 by December 31st of this year you can contribute an additional \$6,000.00 for a total of \$24,000.00 dollars. If you have any questions about the limits, please contact your Financial Advisor or your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727

Overall Progress: **0% Complete**

To change your Deferral amount and /or Investment provider, please select the [>] sign below to open the Investment options for the plan type you wish to make changes for. Please make your selection and check the Include box. If you wish to continue deferrals to a specific vendor or plan type, please reenter that amount and check the Include box. Once you have entered an amount and check the Include box for each Investment provider you are deferring to, check the box next to "I authorize this investment election change", then click Next.

This Salary Deferral Change request must be submitted 30 days before the effective date for your districts payroll cycle. Please contact your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727 or School District if you have any questions.

>	403(b) Deferral	<input checked="" type="checkbox"/> Include
>	403(b) Employer Contribution	<input type="checkbox"/> Include
>	Roth 403(b) Deferral	<input type="checkbox"/> Include

I authorize this investment election change

5. If your district allows you to choose a dollar deferral or a percentage deferral, you will have the option of making the change via the drop down at the top of the list of investment providers.
6. Your current deferral amount will show in the **Current Deferral Amount** column. If you do not have an existing deferral, this column will show \$0.00.

7. Enter your deferral amount in the **New Deferral Amount** column. Find the box that corresponds with your investment provider and enter the amount there.
 - If you wish to continue an existing deferral to a vendor, and are adding or changing another vendor, you will need to re-enter the amount you are keeping in the box that corresponds with that vendor.
 - If you do not, the deferral to that vendor will be cancelled. (Note: must retain ER & Roth if applicable)

403(b) Deferral Include

Contribution method
Dollar

Investment Provider	Current Deferral Amount	New Deferral Amount
American Fidelity (1062)	\$0.00	\$ <input type="text" value="0"/>
Americo Financial Life and Annuity	\$0.00	\$ <input type="text" value="0"/>
Ameriprise Financial Inc(1041)	\$0.00	\$ <input type="text" value="0"/>
Ameritas Life Insurance Corp	\$0.00	\$ <input type="text" value="0"/>
Annuity Investors (1096)	\$0.00	\$ <input type="text" value="0"/>
American United Life	\$0.00	\$ <input type="text" value="0"/>
Athene	\$0.00	\$ <input type="text" value="0"/>
AXA Equitable (1067)	\$0.00	\$ <input type="text" value="0"/>
CalSTRS	\$0.00	\$ <input type="text" value="0"/>
Commonwealth Annuity and Life Insurance	\$0.00	\$ <input type="text" value="0"/>
Fidelity Investments	\$0.00	\$ <input type="text" value="0"/>
Foresters Financial Services	\$0.00	\$ <input type="text" value="0"/>
Franklin Templeton (1025)	\$0.00	\$ <input type="text" value="0"/>
FTJ (1148)	\$0.00	\$ <input type="text" value="0"/>
GALIC (1092)	\$0.00	\$ <input type="text" value="0"/>
Great Southern Life Insurance Company	\$0.00	\$ <input type="text" value="0"/>
GWN (1113)	\$0.00	\$ <input type="text" value="0"/>
Hartford Life Insurance Company	\$0.00	\$ <input type="text" value="0"/>
Horace Mann (1014)	\$0.00	\$ <input type="text" value="0"/>
Industrial-Alliance (1135)	\$0.00	\$ <input type="text" value="0"/>
Voya (1060)	\$0.00	\$ <input type="text" value="0"/>
Voya (1059)	\$0.00	\$ <input type="text" value="0"/>
Legend Group (1052)	\$0.00	\$ <input type="text" value="0"/>
Lincoln Investment Planning Inc	\$0.00	\$ <input type="text" value="0"/>

| Problems viewing the site? Please contact us at 800.462.8928, ext. 4727



8. Ensure that your total allocation amount in the **New Deferral Amount** column matches the full amount you are electing to defer inclusive of all investment providers for that plan type.
9. Click the *'I authorize this investment election change'* box in order to authorize your elections and click next to proceed to the confirmation page.

10. Review your Current and New Deferral Amount(s) for accuracy. If they are correct, click “Next”.

Waddell and Heed (1042)	\$0.00	\$ 0
Western National Life Insurance Company	\$0.00	\$ 0
Allianz	\$0.00	\$ 0
RSG Securities (1174)	\$0.00	\$ 0
AIG Annuity(8939)	\$0.00	\$ 0
AIG Annuity(8014)	\$0.00	\$ 0
Western National Life (8014)	\$0.00	\$ 0
Veritrust (8012)	\$0.00	\$ 0
Oppenheimer (9TOPPE)	\$0.00	\$ 0
SchoolsFirst RBP (9TNRBP)	\$150.00	\$ 200.00
TOTAL ALLOCATION	\$150.00	\$250.00

> 403(b) Employer Contribution Include

> Roth 403(b) Deferral Include

I authorize this investment election change




CANCEL NEXT

11. A confirmation number will appear when the system has finalized your request. A copy will be stored for you and can be accessed via the **Plan Summary** page under **Transaction Confirmations**, should you need it in the future.

12. Click done to complete the process.

Dashboard Close Call Salary Reduction Change & Exchange Request Loans & Distribution Transaction History Investment Providers

Plan Administration Forms SchoolsFirst FDU Password Change Personal Info

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If you are over 50 or will be the age of 50 by December 31st of this year you can contribute an additional \$6,000.00 for a total of \$24,000.00 dollars. If you have any questions about the limits, please contact your Financial Advisor or your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727

Thank you for submitting your request. We are working on it now.

Confirmation Number: 86308

Elections Confirmation

403(b) Deferral

Investment Provider	Current Deferral Amount	New Deferral Amount
SchoolsFirst RBP (9TNRBP)	\$150.00	\$156.00
TOTAL ALLOCATION	\$150.00	\$156.00

A confirmation email will be sent to: beach0371@yahoo.com

DONE

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Important information to note about your deferral elections:

- An account must be established with the investment provider prior to completing this process.
- Deferrals sent to an investment provider without an active account will result in a returned contribution.
- Salary deferral requests must be submitted 30 days before the effective date for your districts payroll cycle.
- If your request is not submitted in time to make the change requested for the current pay cycle, it will be effective for the following pay cycle.
- Online salary deferral changes are submitted to your district the following business day. Your changes will be applicable for the next available date.
- The change submitted online will supersede any instructions that you currently have on file.
- If multiple changes for the plan are submitted on the same day, the last entry will be considered the requested change.
- If you wish to continue an existing deferral to a vendor, and are adding or changing another vendor, you will need to enter the vendor and amount you are retaining. If you do not, the deferral to that vendor will be cancelled.
- If you want to have different amounts for future payroll deferrals, you will need to submit a change during each deferral period or submit the SRA with a future date. The PlanVue™ system does not allow future dated requests.

