

Procedures for 403(b) Transactions

(Loans, Withdrawals, Exchanges and Transfers)

1. Obtain, fill out and sign a District Authorization Form for 403(b) Transactions. (Forms are available on the Texas Benefit Services, L.L.P. website at www.txbenefitservices.com, click on the district name, then click on 403(b) Forms, and print the above mentioned form). Forms may also be available on the District website.
2. Fax a copy or deliver originals of the District's Transaction Authorization Form, and any vendor forms which require the employer's signature, to the Chief Financial Officer.
3. District will notify employee or agent/broker, that the forms have been signed and are ready for pick-up. Neither the District nor Texas Benefit Services, L.L.P. is responsible for forwarding approved forms to a vendor, employee or agent/broker.

For questions contact:

Travis Jobson
Texas Benefit Services, L.L.P.
1-800-594-4100