

# 457(b) Plan Enrollment Instructions - The HUB SSO



These instructions are for creating and accessing a traditional 457(b) account and/or a Roth 457(b) account.

**TRADITIONAL 457(b):** This plan automatically deducts part of your salary into the retirement savings plan **before** taxes are taken out. The money grows tax-deferred until it's withdrawn—then the taxes come due.

**ROTH 457(b):** This plan automatically deducts part of your salary into the retirement savings plan **after** taxes are taken out. The interest and earnings withdrawn from a Roth account are tax-free if the distribution is considered “qualified.”

**REMINDER:** You can have both a traditional and a Roth 457(b)—and contribute to one or both at the same time—if allowed by your plan.

## 1. Confirm your personal information and click submit

### Security Questions and Answers

In the event that you lose your Password, please set up the answer to your "Lost Password" verification question.

Verification question	Verification answer
What is your pet's name?	Mopsi

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### Your Personal Information

First name *	Last name *
TestUserFirst	TestUserLast
Date of birth (mm/dd/yyyy)	Date of hire
05/11/2000	08/12/2015

Gender

Male  Female

Street address 1	Street address 2	
3333 Test Street		
City	State	Zip code
Test City	TX	77777

Country

USA

Home phone	512	600	5000	
Office phone	512	600	6000	Ext
Other phone	512	600	7000	

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### Email

If you would like to receive confirmations of transactions, please fill out the following information.

Home	Confirm home email address
testuser@gmail.com	testuser@gmail.com
Office	Confirm office email address
Other	Confirm other email address

Where would you like your participant statements sent?  Home  Office  Other  None  I do not have an email address

\*Note: Be sure to continue through all steps of the enrollment process until you receive confirmation that your enrollment is complete. If you cancel or close your browser before completing the process, your enrollment will not be processed.

CANCEL NEXT

Remember all investing involves risk.

- Designate your beneficiaries on this screen. After you insert your Primary beneficiary's information, click **ADD** to add additional beneficiaries.

Dashboard Forms & Reports Plan Selection

### Designate Your Beneficiaries

Overall Progress: **33% Complete**

This designation can have important tax and legal effects: you may wish to consult your advisor before continuing.

Beneficiary Designation 1

Items marked with asterisk (\*) must be completed before you can proceed to the next step.

Beneficiary type: Primary Beneficiary percentage: [ ]

Name: [ ] Relationship: [ ] Birth date: [ ] Social security number (optional): [ ]

Street address 1: [ ] Street address 2: [ ]

City: [ ] State: [ ] Zip code: [ ] Country: [ ]

Buttons: ADD, BACK, NEXT, DELETE

- Contributions**

Make your selection from the drop down box—either the **Pre-Tax** or post-tax **Roth** contribution type.

Enter the contribution dollar amount per pay period. (If allowed by your district, you may select your funds by percentages.)

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

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Dashboard Forms & Reports Plan Selection

### Contributions

Overall Progress: **40% Complete**

Current Contribution Amounts

Last Web/VRU Contribution	Total
Pre-Tax Deferral	\$0.00 per pay period
Roth	\$0.00 per pay period

Change Contribution Amounts

Please enter a contribution percentage or dollar amount that your employer will deduct from your compensation each payroll period for deposit to your account.

> Rules and Criteria

Action	Contribution Type	Percent/Dollar	Current Contribution	New Contribution Rate
No change	Pre-Tax Deferral	Dollar	Not contributing	0.00 per pay period
No change	Roth	Dollar	Not contributing	0.00 per pay period

Buttons: RESET, BACK, NEXT

Remember all investing involves risk.

- Click **All Sources** to reveal the funds available.  
Click **NEXT**.

The screenshot shows the 'Select Investments' page with a progress bar at 50% complete. It includes a 'Print' icon, a 'Plan Selection' dropdown, and navigation buttons for 'BACK' and 'NEXT'.

- Here you will apply the dollar amount (or percentage) of your contribution to the investment(s) of your choice.

Once you are satisfied with your choices and your total at the bottom of the page equals 100%, click **NEXT**.

The screenshot shows a table for selecting investments. The table has columns for 'Investment', 'Current Elections', and 'New Elections'. Each row lists an investment name with a 'details' link, a 'Current Elections' percentage, and a 'New Elections' percentage with an input field. A 'RESET TABLE' button is located below the table.

Investment	Current Elections	New Elections
RAMS Aggressive Growth <a href="#">details</a>	0.00%	<input type="text" value="0.00 %"/>
RAMS Capital Preservation <a href="#">details</a>	0.00%	<input type="text" value="0.00 %"/>
RAMS Conservative <a href="#">details</a>	0.00%	<input type="text" value="0.00 %"/>
RAMS Growth <a href="#">details</a>	0.00%	<input type="text" value="0.00 %"/>
RAMS Moderately Conservative <a href="#">details</a>	0.00%	<input type="text" value="0.00 %"/>
RAMS Signature Portfolio <a href="#">details</a>	0.00%	<input type="text" value="0.00 %"/>
DFA Continental Small	0.00%	<input type="text" value="0.00 %"/>
DFA Intl Small Cap Value	0.00%	<input type="text" value="0.00 %"/>
DFA Large Cap International	0.00%	<input type="text" value="0.00 %"/>
DFA US Large Company Portfolio	0.00%	<input type="text" value="0.00 %"/>
Vanguard Total Stock Index	0.00%	<input type="text" value="0.00 %"/>
DFA US Large Value	0.00%	<input type="text" value="0.00 %"/>
Vanguard Wellington	0.00%	<input type="text" value="0.00 %"/>
Blackrock Total Return Instl	0.00%	<input type="text" value="0.00 %"/>
Columbia Corporate Income Fund Y	0.00%	<input type="text" value="0.00 %"/>
Met Life Stable Value Fund <a href="#">details</a>	0.00%	<input type="text" value="0.00 %"/>
Victory Emerging Markets Small Cap I	0.00%	<input type="text" value="0.00 %"/>
Victory Fund For Income	0.00%	<input type="text" value="0.00 %"/>
Goldman Sachs Commodity Strategy	0.00%	<input type="text" value="0.00 %"/>
DFA US Micro Cap	0.00%	<input type="text" value="0.00 %"/>
DFA US Small Company	0.00%	<input type="text" value="0.00 %"/>
DFA US Small Value	0.00%	<input type="text" value="0.00 %"/>
<b>TOTAL</b>	<b>0.00%</b>	<b>0.00%</b>

Remember all investing involves risk.

6. Review all entries. Make any changes using the **Edit** buttons.

Click **SUBMIT** when you are satisfied.

The screenshot shows the 'Enrollment steps' page with an overall progress of 66%. The 'Confirm & Submit' section includes a confirmation message: 'If your enrollment information is correct, click below to submit your enrollment request.' Below this are several sections, each with an 'Edit' button:

- Personal Information:** Includes fields for Username (TESTUSER), First name (TESTFIRST), Last name (TESTLAST), Street address 1 (0000 TEST ADDRESS), City (CEDAR PARK), State (TX), Zip code (78613), Country (USA), Date of birth (03/03/1980), Home phone (655) 222-1212, Office phone (0) - Ext, Other phone (0) - Ext, Home email address (TESTEMAIL@GMAIL.COM), Other email address, Office email address, and Send email confirmation to (Home).
- Security Question:** Security Question 1: 'What is your pet's name?' Answer 1: 'Lola'.
- Salary Deferral Elections:** Pre-tax contributions: 'Deduct \$222.00 each pay period.' ROTH 401 (k) contributions: 'Deduct \$444.00 each pay period.'
- Beneficiary Designations:** Primary Beneficiary: Name (TEST HUSBAND), City (CEDAR PARK), State (TX), Relationship (Spouse), Zip code (78613), Birth date (03/02/1986), Country (USA), Home Address (111 TEST BENEFICIARY ST), Social security number (optional) (XXX-XX-7953).
- Investment Elections:** All future contributions to the plan will be invested as follows: DFA US Large Company Portfolio (25.00%), Vanguard Total Stock Index (75.00%).

A 'SUBMIT' button is located at the bottom right of the form.

7. Well done! You are finished! Your six-digit confirmation number will be emailed.

The screenshot shows the 'Enrollment steps' page with an overall progress of 100%. A green banner reads: 'Congratulations! Your Enrollment is Complete.' Below this, a message states: 'You may access your account via the plan's website at at any time using your Username and Password. If you elected to receive email confirmations, you will receive confirmation of your enrollment at the email address specified.' A 'Reminders' section notes: 'The investment elections you entered during the enrollment process will apply to all sources of contributions. For more information, please contact your plan administrator.' A 'GO TO PLAN' button is located at the bottom right.

8. From this **Dashboard** screen you can view the performance of your funds, change your contribution rate, manage your investments, etc.

Scroll down to see chosen investments, fund ID, performance, paycheck deductions and balance.

(The two funds shown are examples only.)

The screenshot shows the 'My Dashboard' screen. It features two main panels:

- Account Balance:** Shows a balance of \$0.00.
- Contribution Rate:** Shows a bar chart with Pre-tax at \$0 and ROTH at \$0.

Below these panels are buttons for 'MANAGE INVESTMENTS' and 'CHANGE CONTRIBUTION RATE'. The 'My Portfolio' section includes a 'View' dropdown set to 'Overview' and a 'Performance model' dropdown set to '1-year'. A table displays the following data:

Investment Name	Fund ID	Performance	From My Paycheck	Balance
DFA US Large Company Portfolio	DFLUSX	-4.15%	25%	\$0.00
Vanguard Total Stock Index	VTSMX	-8.04%	75%	\$0.00

Remember all investing involves risk.