457(b) Plan Enrollment Instructions - The HUB SSO

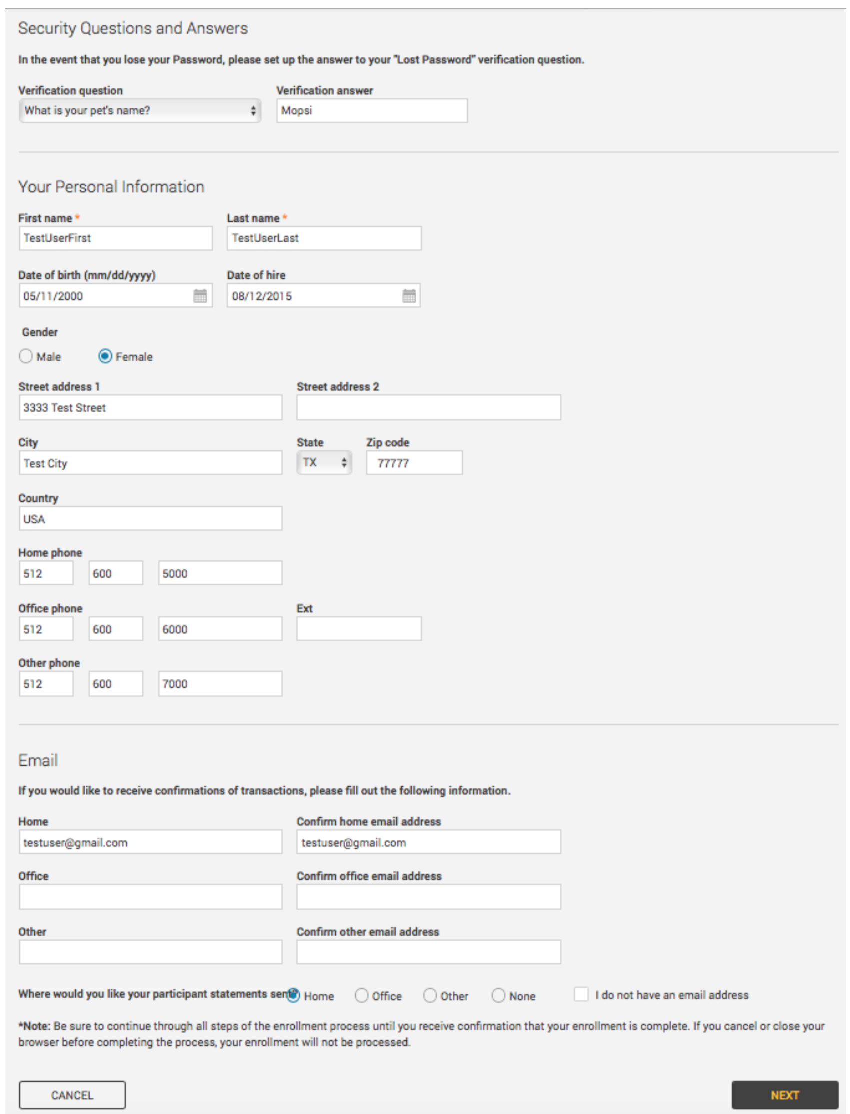
These instructions are for creating and accessing a traditional 457(b) account and/or a Roth 457(b) account.

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 The money grows tax-deferred until it's withdrawn—then the taxes come due.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 The interest and earnings withdrawn from a Roth account are tax-free if the distribution is considered "qualified."

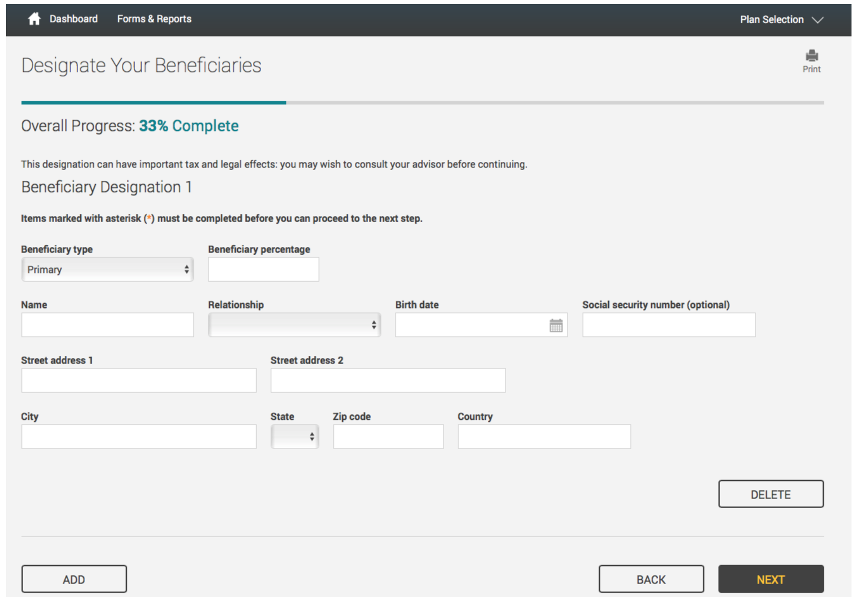
REMINDER: You can have both a traditional and a Roth 457(b)—and contribute to one or both at the same time—if allowed by your plan.

1. Confirm your personal information and click sumbit



Remember all investing involves risk.

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

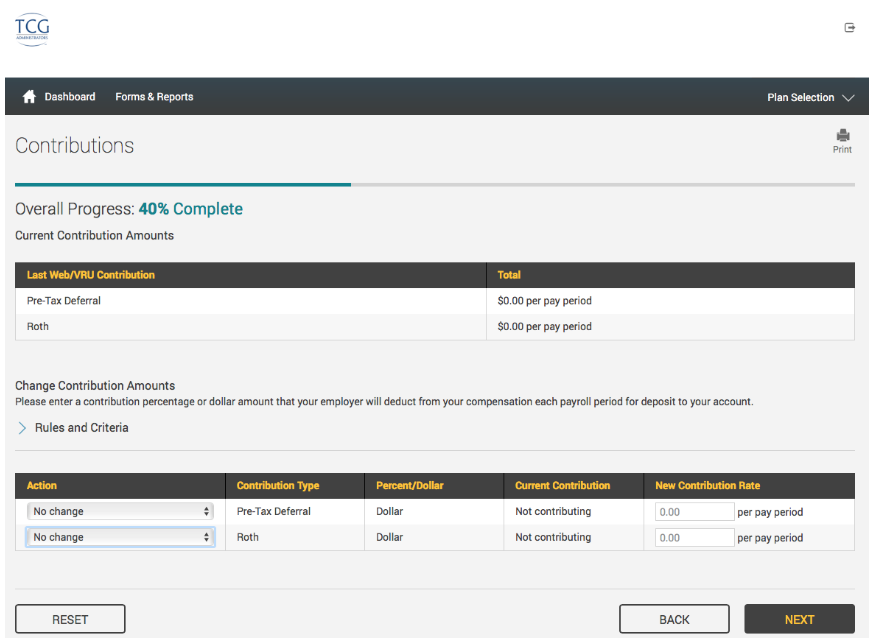


3. **Contributions**

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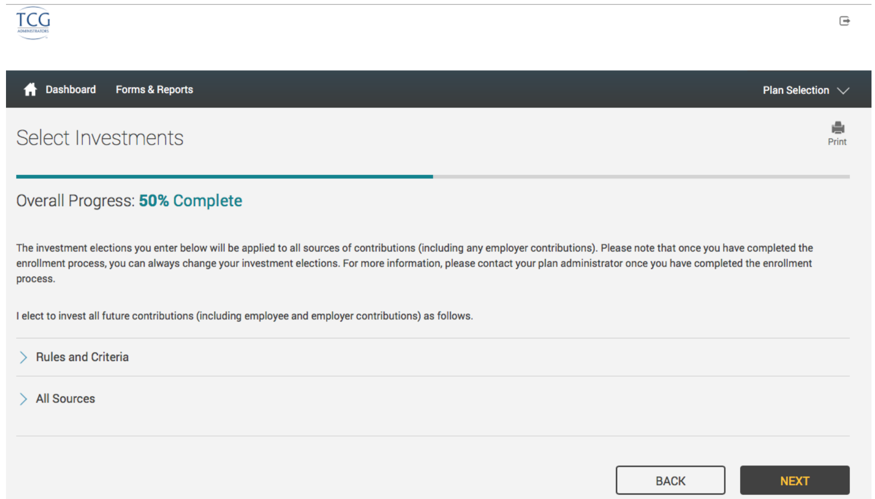
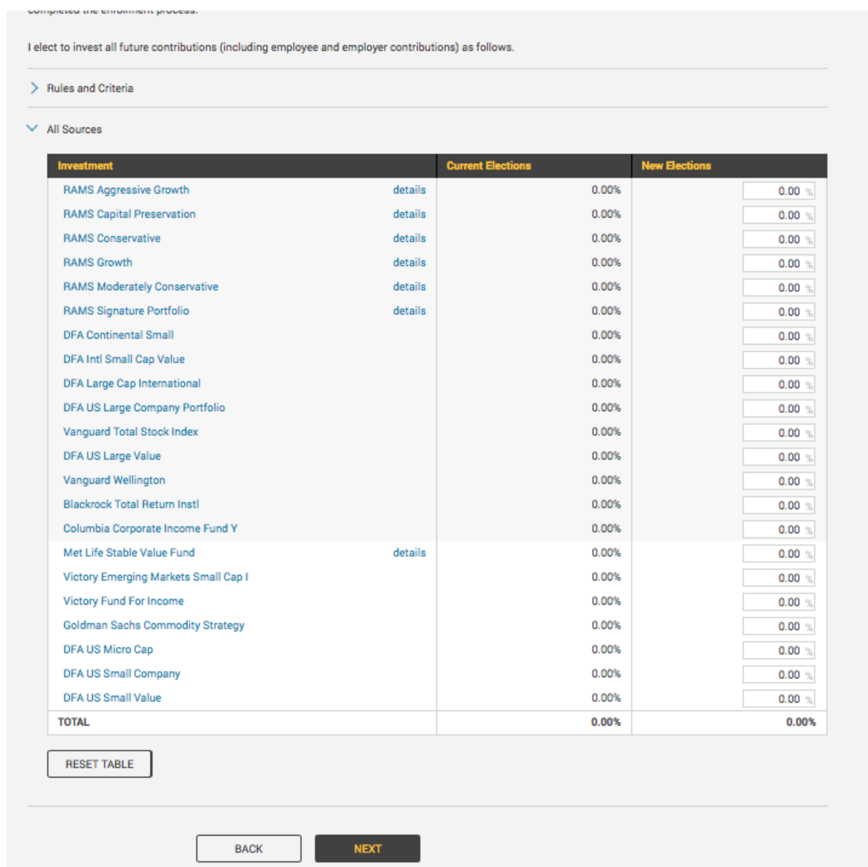
4. Click **All Sources** to reveal the funds available.
   Click **NEXT.**



5. 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**.



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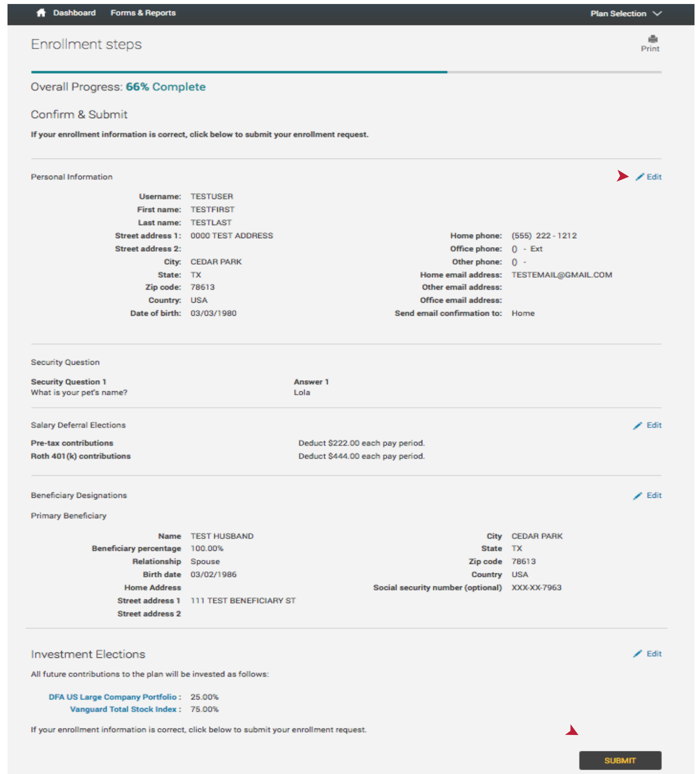
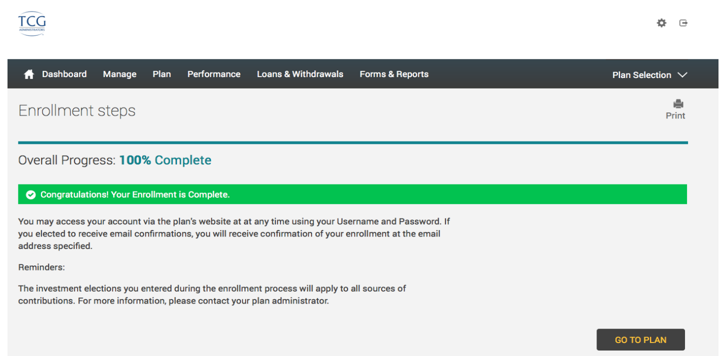
6. Review all entries. Make any changes using the **Edit** buttons.

   Click **SUBMIT** when you are satisfied.



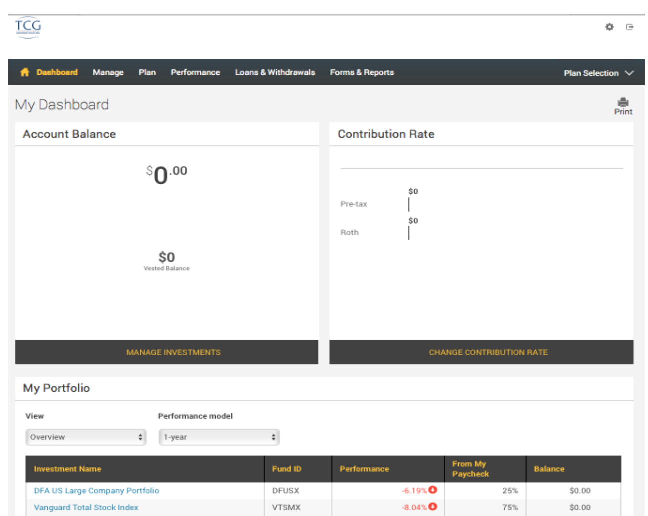
7. Well done! You are finished! Your six-digit confirmation number will be emailed.



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.)



Remember all investing involves risk.