

## MAKING CHANGES TO YOUR 403b or 457 ACCOUNTS ON LINE – NO PAPERWORK REQUIRED

The enhanced functionality with the TDS on-line systems allows you to go to their website and complete on-line forms to initiate any change to your TSA (either 403(b) or 457). Once the on-line form is submitted it is uploaded directly into TDS's computer systems where they will check to see if the account is valid, open for contributions or if the change will keep you in compliance with the legal requirements.

You no longer have to download forms, complete them and submit to Payroll to make changes. While you can still submit paper forms, we ask you to make use of the new on-line function to save time and reduce mistakes.

To access their on-line system simply type **TDSPLANS.ORG** in any browser. You will get the following screen:



### Getting Started

To view forms and other plan information specific to your organization, select your state then begin typing the name of your employer into the Employer Name field. When the name of your employer appears in the options area, click on its name to select it.

EMPLOYER STATE: EMPLOYER NAME:

California  Fremont Union High School District

From the drop down box for EMPLOYER STATE select CA. In the EMPLOYER NAME box begin typing the districts name – Once the system comes up with FREMONT UNION HIGH SCHOOL DISTRICT press the SHOW DETAILS button.

You will then get the screen where you access the on-line forms for both the 403(b)'s and 457's.

See Image below!

# Fremont Union High School District

Sunnyvale, CA

**403(b) Plan**

**457(b) Plan**

Current Status: **Active**

## Salary Amendment Agreement Forms (SAA)

 [403\(b\) Online SAA](#)

 [403\(b\) Downloadable PDF SAA](#)

PLEASE NOTE: To utilize the full functionality available within this PDF form, Adobe Acrobat is recommended. If using Chrome as your web browser, you will need to save the form and open in Adobe Acrobat prior to completing it electronically.

## Plan Transaction Forms

[403\(b\) Transaction Overview](#) | [Upload Supporting Files](#)

 [403\(b\) Online Hardship Form](#)

 [403\(b\) Online Loan Form](#)

 [403\(b\) Online Other Disbursement Form](#)

## 403(b) Service Based Catch-Up

 [Online Request Form](#)

 [Downloadable PDF Version](#)

## 403(b) Providers

[American Century Services LLC](#)  
[American Fidelity Assurance Co.](#)  
[American Funds Service Company](#)  
[American United Life Ins Co 1](#)  
[Americo Financial Life/Annuity](#)  
[Ameriprise Financial Services, Inc.](#)  
[AXA Equitable Life Insurance Company](#)  
[Brighthouse Life Ins \(MetLife CT/Travelers\)](#)  
[California Teachers Association \(CTA\) \[Fee: \\$3.00\]](#)  
[CalSTRS Pension 2 \(VOYA\)](#)  
[Calvert Funds](#)  
[DWS Investments](#)  
[Fidelity Management Trust](#)  
[Fiduciary Trust Intl-Franklin Templeton](#)  
[Foresters Financial \(First Investors\)](#)  
[FTJ Fundchoice, Inc](#)  
[Global Atlantic Financial Group](#)  
[GLP & Associates](#)  
[Great American Insurance Group](#)  
[Great West Life Ins. Co.](#)  
[GWN/Employee Deposit Acct](#)  
[Horace Mann Life Ins. Co.](#)  
[Industrial Alliance Ins & Fin. Serv. Inc](#)  
[Jackson National Life III](#)  
[Kansas City Life Insurance Company](#)  
[Lincoln Investment Planning](#)  
[Lincoln National](#)  
[MetLife](#)

Click on the Online SSA link. This link is available on the 403(b) tab and the 457 (b) tab. You will be presented with a fill-in the blanks form. Once completed, the data is fed directly into TDS's systems, verified and then Payroll is notified of the changes.

If you still want to manually complete the forms then click on the Downloadable PDF – SAA icon for the TSA you want to change. Complete the form, print, sign and date it and submit to Payroll for processing.

Whichever method you choose to use, you must fill-in every field in the Employee Information section. If that section is not complete, it will delay the processing of the change until the missing information is supplied.

If you have any questions, don't hesitate to contact Payroll.