

## NBS Online Salary Reduction Agreement Instructions

The participant can start, change or cancel their 403(b) and 457(b) contributions online through National Benefit Services 24 hours a day, seven days a week.

To get started, please follow the instructions below.

\*If you are an advisor using the online tool **with** the participant, you agree that you are assisting the participant and not completing this without their knowledge.

1. Go to [www.nbsbenefits.com](http://www.nbsbenefits.com)
2. Under "Account Access" dropdown select "Retirement Login", then "Account Access" under Non-ERISA.
3. If the participant is a new user, click on "New User". Use this code specific to your employer to get started, **53014B1 for the 403(b) plan and 53017B1 for the 457 plan**. If the participant is a registered user, enter in the Social Security Number (SSN) with no dashes as a username and last 4 numbers of the SSN as a password. Click Login.
4. The participant must create a unique username and password. Please follow the criteria that must be met in order to have a valid username and password. If the participant forgets their username and/or password, please contact NBS by phone at 1(800)274-0503 option 5.
5. Submit to continue. You are ready to start, change or cancel your retirement contributions.
6. Click on the link provided specifically for the plan.
7. Click "Contribution Amount Change" under the account balance box. Next, Click on the check mark in the "Change Elections" box.
8. First, select effective date. Click "Include" box to the right. In the drop down provided of the pre-tax and Roth deferrals, select the investment provider you have established an account with. Then input requested monthly dollar contribution amount.
9. Read the "disclaimer and disclosures" at the bottom of the screen and mark the checkbox if you agree to the terms & conditions. Click Next.
10. Review a summary of the changes and submit. The participant will be provided a confirmation number informing that NBS has received your request for the online SRA. Click done. Your online SRA has been received by NBS and is currently being processed. Your contributions will take effect for the associated effective date corresponding with your employer's monthly SRA due date.
11. If you would like a copy of your SRA, under "Reports & Forms" click "Reports" then click on the drop down under "Report Group: None", then click on the "Salary Reduction Agreement" link to download or print any newly sent online SRA's.

For more information regarding your employer's retirement plan

- Visit NBS website at [www.nbsbenefits.com/non-erisa-403b-forms](http://www.nbsbenefits.com/non-erisa-403b-forms)
- Call a representative at 1(800)274-0503 option 5
- Email at [403bsupport@nbsbenefits.com](mailto:403bsupport@nbsbenefits.com)

