



NORTH EAST

INDEPENDENT SCHOOL DISTRICT

In order to establish a new 403(b) and begin contributions or update an existing contribution follow the steps below:

1. Determine which company you would like to invest your contributions with. A list of approved vendors can be found by accessing the NBS website: <http://www.nbsbenefits.com/non-erisa-403b-forms/>
2. Contact the vendor of your choosing directly to obtain and submit all necessary paperwork to open the account.
3. Complete the Salary Reduction Agreement online via the National Benefit Services participant portal, or
4. Complete a hardcopy Salary Reduction Agreement and submit to National Benefit Services via mail or fax. Hardcopy form can be accessed from the same link in #1 above.

Note: For the online instructions, a "new user" is a **first-time 403(b) participant**. If you are currently participating or have participated in the NEISD 403(b) plan, you are a "registered user". Please follow the appropriate login instructions according to your participation level.

