

SchoolsFirst FCU Plan Administration:

Plan Vue[®] Guide
for Participants



SchoolsFirst Federal Credit Union (FCU) Plan Administration: Plan Vue Guide for Participants

Welcome to the SchoolsFirst FCU Plan Vue® Guide for Participants. The following guide was assembled to introduce you to the Plan Vue system. We have included an orientation to the key functions of the system as well as answers to some of the most Frequently Asked Questions we receive.

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Contact Us

Our goal as your district's 403(b)/457(b) Plan Administrator is to provide you with the very best personal service. For assistance with the Plan Vue system, please contact a SchoolsFirst FCU Third Party Plan Administrator:

Phone: 800.462.8328, ext. 4727

Email: retirement@schoolsfirstfcu.org

Hours:

Monday through Friday: 7 a.m. to 7 p.m.

Saturday: 9 a.m. to 3 p.m.

Accessing Plan Vue

New Users:

To access the Plan Vue website as a Participant, please complete the following steps:

1. **Visit** <https://pa.schoolsfirstfcu.org>

Note: System Requirements

Plan Vue requires your computer to have the most updated version of web browser and/or Java available. It is compatible with Mozilla Firefox, Google Chrome, Apple Safari, and Microsoft Internet Explorer 9.0+. If you are experiencing issues accessing the site or uploading files, an out of date browser or Java version is most likely the cause. To determine the specific issue, use the link at the bottom of the site titled "Problems viewing the site?". Once the Browser Compatibility results appear on the screen, contact your district's IT department for assistance with upgrading your computer.

If you are experiencing formatting issues, the issue may be different. It is recommended that Plan Vue be accessed in Internet Explorer or Google Chrome as Mozilla Firefox will transfer any customization made to the browser over to Plan Vue which could result in screen distortion.

If neither of these solutions resolves your issues, contact a Plan Administrator at 800.462.8328, extension 8793 and we will be happy to assist you.

2. **User ID:** Enter your 9-digit social security number *(without dashes or spaces)*

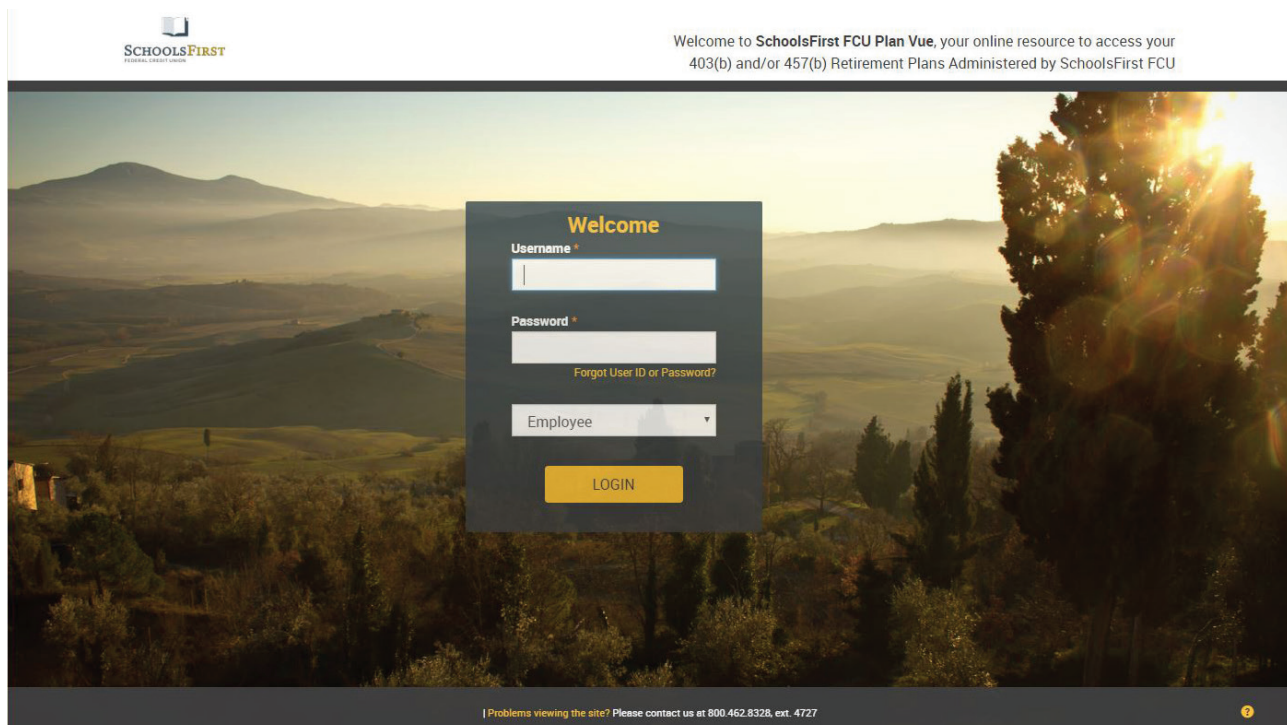
Note: This information is encrypted and is not shared with any third party

3. **Password:** Enter the last 4-digits of your social security number

Note: This information is encrypted and is not shared with any third party

4. **Select Role:** Select **Employee** in the drop-down menu

5. Click Login



6. Select an **Alternate Verification Question** that will be asked when you log in on a new computer; Enter the answer to the question you choose in the answer box and click **Submit**

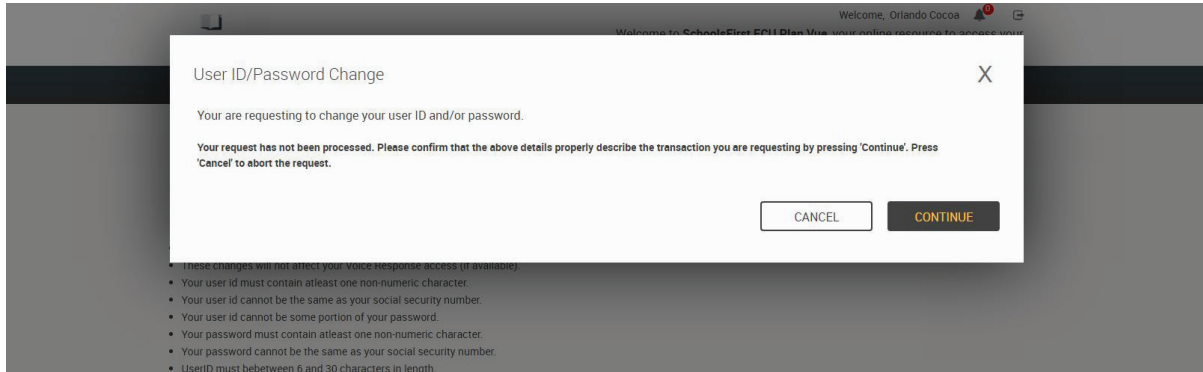
7. Create a new **User ID** and **Password** (*your selections must meet the listed requirements*); Your **Previous Password** is the last 4-digits of your social security number

Note: You will only need to complete the password change process once as the Plan Vue password never expires.

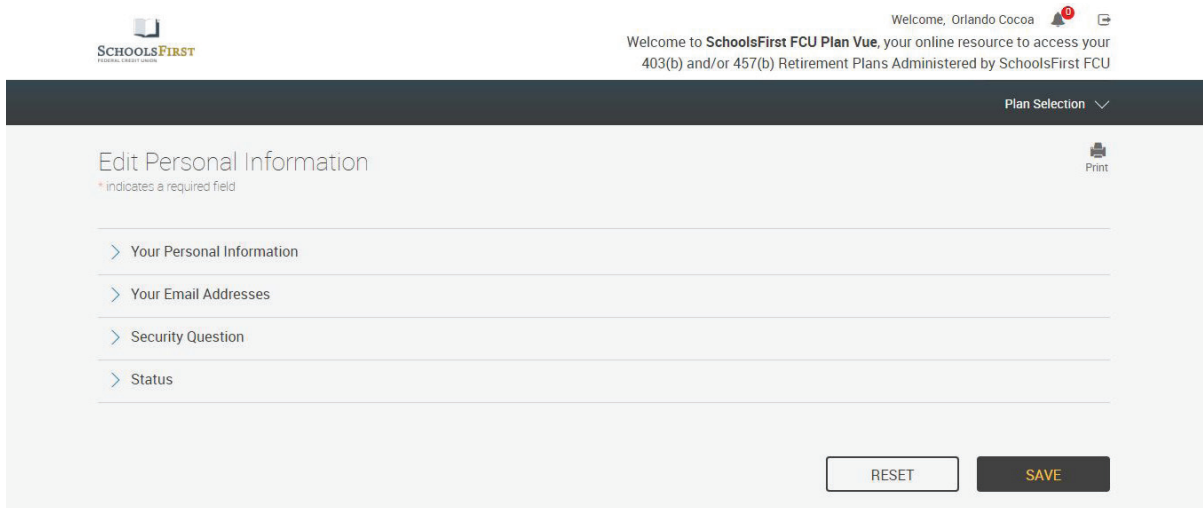
Password Requirements:

- Minimum of 7 characters
- Maximum of 17 characters
- Must contain at least 1 letter
- Cannot match your User ID
- Case-sensitive
- Cannot match your User ID
- Case-sensitive

- Click **Submit** to confirm your User ID and Password change, and then click **Continue** on the pop-up screen



- You will be taken to the **Personal Info** tab to enter an email address and update your preferences. Your email address will be used to send you confirmations of your salary reduction changes.

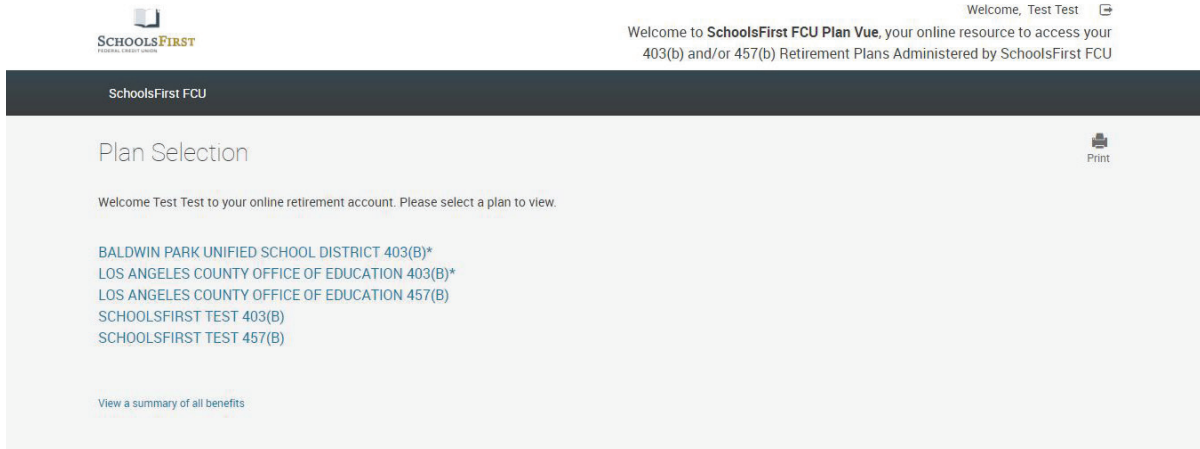


Plan Selection

Once you have successfully logged into Plan Vue, **select the plan** you would like to enter by clicking on the name of the plan type.

An asterisk (*) next to the plan name denotes that your district has elected to offer the Roth 403(b) option as a part of the 403(b) plan. The Roth post-tax deferral and 403(b) deferral information will be communicated together as they are the same base plan type.

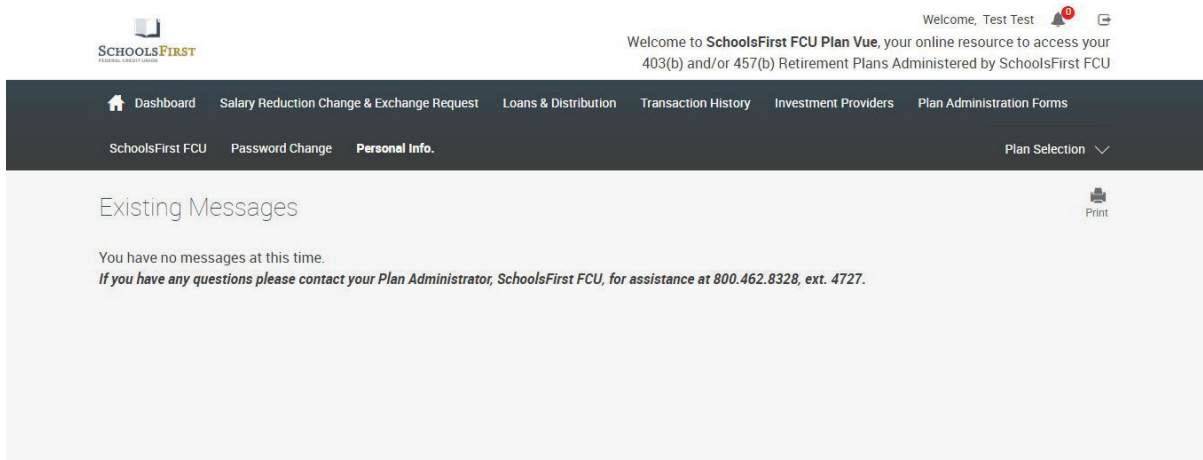
Note: Plan Vue keeps the 403(b) and 457(b) plans separate and will only communicate information regarding that plan in the designated profile.



View Your Messages

On your **Existing Messages** page, you will find important messages sent by your Plan Administrator communicating regulatory changes and important reminders.

Click on the message title to open and read details of the message. Once you have read the message, you may delete it from your message inbox by selecting the box below **Delete Message(s)** and clicking **Submit**.



Plan Summary (Dashboard)

To view a summary of your plan participation, click the **Dashboard** tab located at the top of the page. In the image below, the number in the circle corresponds to the descriptions of each section.

Welcome, Test Test

Welcome to SchoolsFirst FCU Plan Vue, your online resource to manage your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

Dashboard | Salary Reduction Change & Exchange Request | Loans & Distribution | Transaction History | Investment Providers | Plan Administration Forms

SchoolsFirst FCU | Password Change | Personal Info. | Plan Selection

Plan Summary

* The balances shown below are only as current as the data provided by each participating Investment Provider and payroll files received from your School District. We suggest to obtain a more up to date balance you contact the Investment Provider directly.

If you have any questions please contact your Plan Administrator, SchoolsFirst FCU, for assistance at 800.462.8328, ext. 4727.

Account Balance 1

\$74,600.00

\$74,600
Vested Balance

My Portfolio 2

View: Overview

Investment Providers	From My Paycheck	Vested Balance	Balance
SchoolsFirst RBP (STNRBP)	\$150.00	\$30,500.00	40.89% \$30,500.00
American Fidelity (1062)		\$12,000.00	16.09% \$12,000.00
Franklin Templeton (1025)		\$12,000.00	16.08% \$12,000.00
MassMutual		\$7,200.00	9.65% \$7,200.00
National Life Group (1036)		\$5,000.00	6.7% \$5,000.00
Oppenheimer (STOPPE)		\$3,300.00	4.42% \$3,300.00
Legend Group (1052)		\$2,850.00	3.82% \$2,850.00
AIG Annuity(8039)		\$1,500.00	2.01% \$1,500.00

Recent Activity 3

Date	Type	Amount	Status
04/11/16	In-service Distribution	\$1,500.00	✓
04/11/16	In-service Distribution	\$1,500.00	✓
04/11/16	In-service Distribution	\$1,500.00	✓
04/11/16	Contribution rate change in contract coordination plan	n/a	✓
04/11/16	Contract coordination investment Election Change	n/a	✓
04/06/16	In-service Distribution	\$150.00	✓
04/04/16	In-service Distribution	\$5,000.00	✓
04/01/16	Percent Fund to Fund Transfer	\$10,000.00	✓
04/01/16	In-service Distribution	n/a	✓

Retirement Tips

Knock Out Debt. KICK UP SAVINGS

Consider paying off your debts such as credit card balances or consumer loans and shifting the monthly payments towards your retirement savings instead. For example, invest \$250 a month in your retirement plan and you could have an extra \$257,000 by the time you retire!

- 1 Account Balance**
A summary of the amount you have deferred from the time you entered the SchoolsFirst FCU Plan and YTD, broken down by Plan Type.
- 2 My Portfolio**
A summary of the amount you have deferred and are currently deferring to each vendor.
- 3 Recent Activity**
Shows amount deferred for the most recent payroll cycles and the date the deferrals were processed and sent to your investment provider.

Setting Up Notifications

Once you set up your Plan Vue profile, go to the **Personal Info** tab located at the top of the page and click on **Your Email Address**. Select the button next to the **Salary Reduction Agreement (SRA)** label to turn it on. If this is not selected, email notifications cannot be sent. You may also elect to have your confirmations sent to your home, office or other email address in this location. Click **Save** at the bottom of the page to save your changes.

Note: Currently we send notifications for any SRA that is submitted through Plan Vue or via fax. Additional notification options will be available once the system is used for processing those transactions.

You can also manage the email address you would like notifications to be sent to.

Welcome, Test Test

Welcome to SchoolsFirst FCU Plan Vue, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

Dashboard Salary Reduction Change & Exchange Request Loans & Distribution Transaction History Investment Providers Plan Administration Forms

SchoolsFirst FCU Password Change **Personal Info.** Plan Selection

Edit Personal Information

* indicated a required field

No changes were made to this Participants personal information.

> Your Personal Information

✓ Your Email Addresses

Home beach0371@yahoo.com Confirm home email address beach0371@yahoo.com

Your office Email address Confirm office email address

Other Email address: Confirm other email address

Send email notification to one of the following: *

Home Office Other None I do not have an email address

Send me an email notification message any time one of the following items occurs within my plan(s).

Salary Reduction Agreement (SRA) Off On

Distribution(s) / Rollover(s) Off On

Loan(s) Off On

Transfers Off On

> Security Question

> Status

RESET SAVE

Investment Providers

Your district has a unique list of 403(b) and/or 457(b) Investment Providers available to you. If you are looking to invest in a 403(b)/457(b) or would like to switch to a new Investment Provider, the Investment Provider page offers links to each of the investment providers available under your district's plan.

Welcome, Test Test

Welcome to SchoolsFirst FCU. View, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

Dashboard Salary Reduction Change & Exchange Request Loans & Distribution Transaction History **Investment Providers** Plan Administration Forms

SchoolsFirst FCU Password Change Personal Info. Plan Selection

Investment Information

Listed below are the Approved Investment Providers available in your Districts Retirement Plan. Use the available links to get more up to date information by clicking on one of the following.

Performance for all available funds

Profile Views
Investment information

Approved Investment Providers	District Inv Id	Investment Info
Athene	1021	View
AIG Annuity(8014)	8939	
AIG Annuity(8939)	8014	
Allianz	1180	View
American Fidelity (1062)	1062	View
American United Life	1128	View
Americo Financial Life an...	1035	View
Ameriprise Financial Inc(...	1041	View
Ameritas Life Insurance C...	1027	View
Annuity Investors (1096)	1096	View
AXA Equitable (1067)	1067	View
CalSTRS	1097	View
Commonwealth Annuity a...	1018	View
Fidelity Investments	1133	View
Foresters Financial Servic...	1077	View
Franklin Templeton (1025)	1025	View
FTJ (1148)	1148	View
GALIC (1092)	1092	View
Great Southern Life Insur...	1197	View
GWN (1113)	1113	View
Hartford Life Insurance C...	1009	View

Problems viewing the site? Please contact us at 800.452.8328, ext. 4727

Salary Reduction Change

On the **Salary Reduction Change** tab located at the top of the page, you can start deferrals, change your deferral amount/vendor, or terminate future deferrals.

Welcome, Test Test

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Dashboard **Salary Reduction Change & Exchange Request** Loans & Distribution Transaction History Investment Providers Plan Administration Forms

SchoolsFirst FCU Password Change Personal Info. Plan Selection

Salary Reduction Change & Exchange Request

Your Balance **\$74,600.00**
 Vested Balance \$74,600.00

What would you like to do?

Change Elections

The Investment Providers you put the money from your paycheck into.

GET STARTED

Move Money

Exchange the money in your account between the Investment Providers in your plan.

GET STARTED

My Portfolio

View

Overview

Investment Providers	From My Paycheck	Vested Balance	Balance
SchoolsFirst RBP (9TNRBP)	\$150.00	\$30,500.00	40.89% \$30,500.00
American Fidelity (1062)		\$12,000.00	16.09% \$12,000.00
Franklin Templeton (1025)		\$12,000.00	16.08% \$12,000.00
MassMutual		\$7,200.00	9.65% \$7,200.00
National Life Group (1036)		\$5,000.00	6.7% \$5,000.00
Oppenheimer (9TOPPE)		\$3,300.00	4.42% \$3,300.00
Legend Group (1052)		\$2,850.00	3.82% \$2,850.00
AIG Annuity(8939)		\$1,500.00	2.01% \$1,500.00
SchoolsFirst RBP (1144)		\$500.00	0.67% \$500.00

! Problems viewing the site? Please contact us at 800.462.8328, ext. 4727

1. **Salary Deferral Change Request:** Click on the arrow to the left of the deferral type you would like to make changes to; this will expand the list of eligible Investment Providers available through your district’s plan. You will need to check the box that says “Include” in order to submit a change for the deferral type you selected. Changes for more than one deferral type may be submitted at the same time, but the “Include” box must be checked or they will be skipped.

The screenshot shows the 'Salary Deferral Change Request' page in the SchoolsFirst FCU Plan Vue system. At the top, there is a navigation bar with links for Dashboard, Salary Reduction Change & Exchange Request, Loans & Distribution, Transaction History, Investment Providers, and Plan Administration Forms. Below this is a secondary navigation bar with links for SchoolsFirst FCU, Password Change, Personal Info, and Plan Selection. The main content area is titled 'Salary Deferral Change Request' and includes a 'Print' icon. It states the 2016 IRS Contribution limit is \$18,000.00 and provides instructions on how to make changes, including selecting investment providers and checking the 'Include' box. A progress indicator shows 'Overall Progress: 0% Complete'. Below the instructions, there are three rows of deferral options, each with an expandable arrow and an 'Include' checkbox. The first row, '403(b) Deferral', has its 'Include' checkbox checked. The second row, '403(b) Employer Contribution', and the third row, 'Roth 403(b) Deferral', have their 'Include' checkboxes unchecked. At the bottom, there is a checkbox for 'I authorize this investment election change' which is also unchecked. Two buttons are visible: a 'CANCEL' button and a 'NEXT' button.

Welcome, Test Test

Welcome to SchoolsFirst FCU Plan Vue, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

Dashboard Salary Reduction Change & Exchange Request Loans & Distribution Transaction History Investment Providers Plan Administration Forms

SchoolsFirst FCU Password Change Personal Info Plan Selection

Salary Deferral Change Request

2016 IRS Contribution limit is \$ 18,000.00.

If you are over 50 or will be the age of 50 by December 31st of this year you can contribute an additional \$6,000.00 for a total of \$24,000.00 dollars. If you have any questions about the limits, please contact your Financial Advisor or your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727

Overall Progress: 0% Complete

To change your Deferral amount and /or Investment provider, please select the [>] sign below to open the Investment options for the plan type you wish to make changes for. Please make your selection and check the Include box. If you wish to continue deferrals to a specific vendor or plan type, please reenter that amount and check the Include box. Once you have entered an amount and check the Include box for each Investment provider you are deferring to, check the box next to "I authorize this investment election change", then click Next.

This Salary Deferral Change request must be submitted 30 days before the effective date for your districts payroll cycle. Please contact your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727 or School District if you have any questions.

> 403(b) Deferral Include

> 403(b) Employer Contribution Include

> Roth 403(b) Deferral Include

I authorize this investment election change

CANCEL NEXT

2. **Current Deferral Amount:** If your district allows you to choose a dollar deferral or a percentage deferral, you will have the option of making the change via the drop down at the top of the list of Investment Providers. Your current deferral amount will show in the **Current Deferral Amount** Column. If you do not have an existing deferral this column will not have any values entered.

403(b) Deferral Include

Contribution method
Dollar

Investment Provider	Current Deferral Amount	New Deferral Amount
American Fidelity (1062)	\$0.00	\$ <input type="text" value="0"/>
Americo Financial Life and Annuity	\$0.00	\$ <input type="text" value="0"/>
Ameriprise Financial Inc(1041)	\$0.00	\$ <input type="text" value="0"/>
Ameritas Life Insurance Corp	\$0.00	\$ <input type="text" value="0"/>
Annuity Investors (1096)	\$0.00	\$ <input type="text" value="0"/>
American United Life	\$0.00	\$ <input type="text" value="0"/>
Athene	\$0.00	\$ <input type="text" value="0"/>
AXA Equitable (1067)	\$0.00	\$ <input type="text" value="0"/>
CalSTRS	\$0.00	\$ <input type="text" value="0"/>
Commonwealth Annuity and Life Insurance	\$0.00	\$ <input type="text" value="0"/>
Fidelity Investments	\$0.00	\$ <input type="text" value="0"/>
Foresters Financial Services	\$0.00	\$ <input type="text" value="0"/>
Franklin Templeton (1025)	\$0.00	\$ <input type="text" value="0"/>
FTJ (1148)	\$0.00	\$ <input type="text" value="0"/>
GALIC (1092)	\$0.00	\$ <input type="text" value="0"/>
Great Southern Life Insurance Company	\$0.00	\$ <input type="text" value="0"/>
GWN (1113)	\$0.00	\$ <input type="text" value="0"/>
Hartford Life Insurance Company	\$0.00	\$ <input type="text" value="0"/>
Horace Mann (1014)	\$0.00	\$ <input type="text" value="0"/>
Industrial-Alliance (1135)	\$0.00	\$ <input type="text" value="0"/>
Voya (1060)	\$0.00	\$ <input type="text" value="0"/>
Voya (1059)	\$0.00	\$ <input type="text" value="0"/>
Legend Group (1052)	\$0.00	\$ <input type="text" value="0"/>
Lincoln Investment Planning Inc	\$0.00	\$ <input type="text" value="0"/>

Problems viewing the site? Please contact us at 800.462.8326 ext. 4727

3. **New Deferral Amount:** Enter your deferral amount(s) in the **New Deferral Amount** column. Find the box that corresponds with your Investment Provider and enter the amount there. If you wish to continue an existing deferral to a vendor, and are adding or changing another vendor, you will need to enter amount you are retaining in the box that corresponds with that vendor. If you do not, the deferral to that vendor will be cancelled.

- Total Allocation:** Ensure that your total deferral amount in the New Deferral Amount column matches the full amount you are electing to defer inclusive of all Investment Providers for that plan type.
- Authorization:** Click the 'I authorize this investment election change' box in order to authorize your elections and proceed to the confirmation page.

Waddell and Hedd (1042)	\$0.00	\$ 0
Western National Life Insurance Company	\$0.00	\$ 0
Allianz	\$0.00	\$ 0
RSG Securities (1174)	\$0.00	\$ 0
AIG Annuity(8939)	\$0.00	\$ 0
AIG Annuity(8014)	\$0.00	\$ 0
Western National Life (8014)	\$0.00	\$ 0
Veritrust (8012)	\$0.00	\$ 0
Oppenheimer (9TOPPE)	\$0.00	\$ 0
SchoolsFirst RBP (9TNRBP)	\$150.00	\$ 200.00
TOTAL ALLOCATION	\$150.00	\$250.00

> 403(b) Employer Contribution Include

> Roth 403(b) Deferral Include

I authorize this investment election change

CANCEL NEXT

- Submit:** Review your **Current and New Deferral Amount(s)** for accuracy. If they are correct, click **Submit**.

Dashboard Salary Reduction Change & Exchange Request Loans & Distribution Transaction History Investment Providers Plan Administration Forms

SchoolsFirst FCU Password Change Personal Info. Plan Selection

Salary Deferral Change Request: Print

2016 IRS Contribution limit is \$ 18,000.00.

If you are over 50 or will be the age of 50 by December 31st of this year you can contribute an additional \$6,000.00 for a total of \$24,000.00 dollars. If you have any questions about the limits, please contact your Financial Advisor or your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727

Overall Progress: **50% Complete**

Review Elections

403(b) Deferral

Investment Provider	Current Deferral Amount	New Deferral Amount
Security Benefit (1022)	\$0.00	\$50.00
SchoolsFirst RBP (9TNRBP)	\$150.00	\$200.00
TOTAL ALLOCATION	\$150.00	\$250.00

I authorize this investment election change

A confirmation email will be sent to: beach0371@yahoo.com [edit email address](#)

CANCEL BACK SUBMIT

7. **The Salary Reduction Agreement:** A confirmation number will appear when the system has finalized your request. A copy will be stored for you and can be accessed via the **Plan Summary** page under **Transaction Confirmations**, should you need it in the future.

Salary Deferral Change Request

2016 IRS Contribution limit is \$ 18,000.00

If you are over 50 or will be the age of 50 by December 31st of this year you can contribute an additional \$6,000.00 for a total of \$24,000.00 dollars. If you have any questions about the limits, please contact your Financial Advisor or your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727

Thank you for submitting your request. We are working on it now.

Confirmation Number: 86308

Elections Confirmation

403(b) Deferral

Investment Provider	Current Deferral Amount	New Deferral Amount
SchoolsFirst RBP (9TNRBP)		\$156.00
TOTAL ALLOCATION	\$150.00	\$156.00

A confirmation email will be sent to: beach0371@yahoo.com

DONE

Important information to note about your deferral elections:

- Salary deferral requests must be submitted **30 days** before the effective date for your districts payroll cycle
- If your request is not submitted in time to make the change requested for the current pay cycle, it will be effective for the following pay cycle
- Online salary deferral changes are submitted to your district the following business day; Your changes will be applicable for the next available date
- The change submitted online will supersede any instructions that you currently have on file
- If multiple changes for the plan are submitted on the same day, the last entry will be considered the requested change
- If you wish to continue an existing deferral to a vendor, and are adding or changing another vendor, you will need to enter the vendor and amount you are retaining; If you do not, the deferral to that vendor will be cancelled
- If you want to have different amounts for future payroll deferrals, you will need to submit a change during each deferral period; The Plan Vue system does not allow future dated requests
- An account must be established with the Investment Provider **prior** to submitting a SRA
- Deferrals sent to an Investment Provider without an active account will result in a returned contribution

Forms

PDF copies of our most commonly used forms have been provided on the **Plan Administration Forms** tab located at the top of the page.

welcome to **SchoolsFirst FCU Plan Vue**, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

Dashboard Salary Reduction Change & Exchange Request Loans & Distribution Transaction History Investment Providers **Plan Administration Forms**

SchoolsFirst FCU Password Change Personal info. Plan Selection

Forms Print

Adobe Acrobat Reader

Name	Size	File Type	From Date	To Date	Delete
Form Group: None					
3 - Nationwide-RBP Outgoing Exchange...	44kb	Adobe Acrobat			
2 - Nationwide-RBP Loan Application	286kb	Adobe Acrobat			
3 - Nationwide-RBP Incoming Exchange...	63kb	Adobe Acrobat			
2 - Nationwide-RBP Hardship Applicatio...	86kb	Adobe Acrobat			
2 - Nationwide-RBP Distribution Applica...	158kb	Adobe Acrobat			
1 - 403(b) Loan Authorization	80kb	Adobe Acrobat			
1 - 403(b) Hardship Authorization	150kb	Adobe Acrobat			
1 - 403(b) Exchange Authorization	92kb	Adobe Acrobat			
1 - 403(b) Distribution Authorization	85kb	Adobe Acrobat			

| Problems viewing the site? Please contact us at 800.462.8328, ext. 4727

Frequently Asked Questions

The following is a list of Frequently Asked Questions we commonly receive from our Participants.

Q. Where do I go to change my deductions?

A. Once you have logged in to the Plan Vue system, you can make changes to your deductions under the 'Salary Reduction Change' tab located at the top of the screen.

Q. How do I access my other 403(b)/457(b) plan?

A. In the upper right hand corner of each screen there is a drop down named **Plan Selection**. When you click on the drop down arrow, there will be a list of your available plans and you may choose the plan you would like to enter.

Q. Why don't my balances match my Investment Provider statement?

A. The balance information has to come from your Investment Provider. We might not receive a regular electronic data feed or any data feed at all from your Investment Provider. In which case, the balance you see in Plan Vue will be the cumulative value of your deferrals that have been uploaded into our system, not the actual account value.

Q. I see my deferral balance on Plan Vue, why doesn't that amount match the amount I have deferred this year?

A. We rely on our school districts to provide us with payroll data so we can present it to you in Plan Vue. If we are not the common remitter for your school district, we may not receive payroll files on a consistent basis. Thus, we are only able to present you with the information we have received.

Q. What happens if I enter multiple changes for the same dollar amount?

A. If you enter multiple changes on the same day or for the same dollar amount, the system should only recognize the last change you requested and that is what will be sent to your district. It is always a good idea to check back the next day to verify that your deferral request reflects as you would like it to so we can make corrections if necessary.

Q. Who do I contact if I don't see the new school district I started working for when I log in?

A. Please contact a Plan Administrator at 800.462.8328, ext: 4727. We can assist you in building your profile so you can make your deferral changes online.

Q. Do I use my User ID and Password from my SchoolsFirst FCU account?

A. No, the SchoolsFirst FCU Plan Vue® system is used to provide our Plan Administration services only at this time. Since Membership is not a requirement to be a Participant in a 403(b) or 457(b) plan with our TPA districts, the service is not integrated into Online Banking. Use your social security number to log in as a new user and you will be prompted to select a unique user ID and password.

Q. Why can't I make changes to my SchoolsFirst FCU/Nationwide RBP through this site?

A. Though SchoolsFirst FCU is the custodian of your RBP plan, it is offered through Nationwide Life. In order to make changes to how your funds are invested, you must go directly to the company that holds the funds.

Q. I want to start a 403(b), can I just log in to Plan Vue and choose an Investment Provider?

A. You will first want to contact the Investment Provider you are interested in to establish your 403(b). If you do not have an account established with the investment provider, your deferrals will be returned to us.

Notes: _____
