



## Instructions and Procedures for Setting Up/Changing 403(b) Plan Deductions

- Be sure the desired 403(b) product is offered through the TRS list of approved vendors. The list can be found on the TRS website: [www.trs.state.tx.us](http://www.trs.state.tx.us). Per Senate Bill 273, all new 403(b)s entered after June 1, 2002 must be on the TRS List of Certified Companies.
- If the company is not on the approved vendor list, select another company or have the company get on the approved list. The company should be able to let you know if it is willing to go through the approval process and tell you how long that process will take.
- Once the company is set up with TRS, please submit the required applicable forms to:

ISC Group, Inc.  
Attn: Patty Teran  
3100 Monticello Ave., Suite 800  
Dallas, TX 75205  
Ph 214-520-1115 or 800-888-3520  
Fax 214-520-3203

- The **required** forms are as follows:

### **For Mutual Funds:**

- a) Salary Reduction Agreement
- b) A copy of the 403(b) application

### **For Annuities:**

- a) Salary Reduction Agreement
- b) TRS Solicitation Agreement (for annuity contracts established after June 1, 2002)
- c) A copy of the 403(b) application

To **INCREASE/DECREASE/TERMINATE** an existing deduction: Submit a Salary Reduction Agreement to ISC Group, Inc. (see above).

### d) **Processing Procedures:**

- a. ISC Group, Inc. will review the paperwork to verify all required forms and information has been included.
- b. If there are any missing requirements, the Sales Representative or Agent will be contacted.
- c. The paperwork will be sent to the payroll department so the new deduction or change can be set up in the payroll system.