HELPFUL GUIDE TO ESTABLISH A 403(b) / 403(b)(7)

403(b) Tax Sheltered Annuity

FIRST FINANCIAL ADMINISTRATORS, INC.
(800) 523-8422
WWW.FFGA.COM
RETIREMENT@FFGA.COM

Pease review the following information before submitting any SRA's (salary reduction agreements) to First Financial Administrators, Inc. (FFA):

STEPS TO ESTABLISH A NEW 403(b) / 403(b)(7) ACCOUNT

1. First you will need to select a vendor of your choice.
    a. Go to www.ffga.com
    b. Select login (right hand top corner)
    c. Select Retirement Plan Information
    d. Enter your employer name
    e. Choose your authorized providers

   If you already have a provider/vendor in mind but need to see if there is an agent in your area, then elect "403(b) Agent Search"

2. In choosing an approved vendor, you will also need an agent to assist you in your enrollment process. If you do not already have an agent, you will need to contact the chosen vendor for an agent near you. The agent will help you complete the following for you to be successfully enrolled:
    a. Enrollment forms: You will need to complete an application with your selected vendor
    b. SRA (salary reduction agreement)
    c. Disclosure Agreement (required for new accounts outside of Texas) (Only Texas is exempt)

   SRA's can be found by following these steps:
    a. Go to www.ffga.com
    a. Select login (right hand top corner)
    b. Select Retirement Plan Information
    c. Enter your employer name
    d. Select 403b Forms & Information
    e. Select 403b salary reduction agreement
        a. New accounts are REQUIRED to have the account number listed
        b. New accounts are REQUIRED to have an agent/broker signature. (No Load companies are exempt from agent signature requirement)

3. After you have successfully enrolled you must submit your SRA to FFA.

4. Any changes (increase, decrease or stop) to your established 403(b) account will require a new SRA. Agent signature is not required for changes only.

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AGENT INFORMATION

All agents must enroll with FFGA before business will be accepted

1. Go to www.ffga.com
2. Select menu (right hand top corner)
3. Under 403(b) Agent Services select "Agent Enrollment"
4. Select Enroll Now

When you enroll you are accepting the "**School District Rules for Solicitation**" for all employer plans we administer. Agents must enroll for new business to get processed.

EMPLOYEES & AGENTS

Once you have completed all necessary forms, please fax/mail to FFA, Attn: Retirement Services Department.

Fax to: 1-866-265-4594 or mail to the following address:

REGULAR MAIL:

First Financial Administrators, Inc.
P.O. Box 670329
Houston, Texas 77267-0329
Attn: Retirement Services

OVERNIGHT MAIL:

First Financial Administrators, Inc.
11811 North Freeway, Suite 900
Houston, Texas 77060
Attn: Retirement Services

Contact Us:

- www.ffga.com
- Toll-free number 1.800.523.8422
- Fax number 1.866.265.4594
- Email: retirement@ffga.com

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