



Aggregated Records and Transactions (ART)

The following information is provided to the representatives of investment providers as an overview of the online 403(b) Plan distribution transaction processing system. Also, representatives may be able to assist their client participant with using the system in the event of a distribution request.

Note: No party other than the participant is authorized to enter the online processing system. Privacy laws apply.

Due to the complexities of retirement plan administration, TSA Consulting Group has been designated as the district's *Plan Administrator* for the 403(b) and/or 457(b) retirement plans. The information below outlines the steps necessary for participants to login into the new online recordkeeping system (ART System) to be able to process all transactions such as loans, rollovers, exchanges, etc. Each participant must follow the instructions to setup their username and password for the recordkeeping system. This applies to all employees that maintain a 403(b) account regardless of whether they are currently contributing to the account.

Participant instructions to establish unique username and password.

STEP 1: Click on the link below to execute the initial login

www.mytsallogin.com

Access to the ART online system is also available through the specific district/college pages at www.tsacg.com.

Your initial username is your SSN (example: 123456789 – no dashes)

Your initial password is your date of birth (example: 06111970 – no dashes – you must use a zero for one digit months)

STEP 2: You will be prompted to answer 2 security questions. Please make sure you remember your answers in the event you forget your username or password in the future.

STEP 3: Follow the on screen instruction carefully to establish a new username and password.

STEP 4: Please proceed to the Personal Profile tab at the top and enter your email address for future reference.

STEP 5: Upon completion of Steps 1 through 4, proceed to the “Summary” tab in the upper menu bar to view your TSA summary information and initiate transactions, view previous confirmations or reports, or click on “Help” for a complete guide of transaction types allowed in ART.

Once you have completed a transaction, the system will create a .pdf certification letter for the employee to print, sign and attach to the necessary provider forms. Please note that the certification letter created by the system is not enough by itself for the provider company to complete the transaction. The provider company's forms must also be completed.

Using the Online Distribution Transaction System

Opening Screen (Sample)

The participant will see balances held in each separate provider account as of the last date of data transmitted by the provider to TSA Consulting Group.

TSA CONSULTING GROUP, INC. TEST COUNTY SCHOOLS
Great Kids with Great Futures

Close Participant **Summary** Investments Transactions Tools Personal Profile HELP

Welcome: Jane Sample TEST COUNTY SCHOOLS Log Out

Personal Information - (To view all Personal Information and e-mail addresses, press "Personal Profile") [View Details](#)

Jane Sample
1234 GOOD STREET
FWB, FL
Home e-mail: jsample@tcschools.net

Approximate Balance for each Investment Provider

Investment Provider/Contract	Approximate Balance
+COMPANY1	\$200,000.00
+LOAN	\$5,237.08
+COMPANY2	\$13,642.54
+COMPANY3	\$13,642.54
+COMPANY4	\$13,642.54
Total:	\$246,164.70

Important Messages
You have 0 message(s) from your plan.

Charted Balances [View Details](#)

Account Balances

[Graph View](#)

Company1	\$200,000.00
Company2	\$13,642.54
Company3	\$13,642.54
Company4	\$13,642.54
Loan	\$5,237.08

<http://www.tsacg.com/> Internet 100%

Transactions Screen is accessible by clicking the tab shown. The participant may then request several different transaction types including loan, exchange, normal cash distribution (Age 59 1/2 or separation from service), rollover into or out of the plan, etc.

Sample Certificate of Approval

In the event that the participant's distribution transaction is approved, a certificate will be generated suitable for printing. **The participant must print and sign the certificate.** It may then be attached to the documents and/or forms required by the provider and forwarded directly to the provider. The documents should NOT be forwarded to TSA Consulting Group.

AEFF6CE24A24482BB4B904B2F2885BC2[1].PDF - Adobe Acrobat Professional

File Edit View Document Comments Forms Tools Advanced Window Help

Create PDF Combine Files Export Start Meeting Secure Sign Forms Review & Comment

2 / 2 51.2% Find

TSA CONSULTING GROUP, INC. **ART** Approved Investments and Transactions 407(b) and 407(b) Plan Administrator

Certificate of Approval
ART Online
Transaction Type: **Exchange Between Investment Providers**
Confirmation Number: 989
Approval Effective Date: 1/6/2010

Participant Name: **Import Test457**
SSN (last 4): **5469**
Termination Date (if applicable):
Date of Birth: **10/06/1941**
Plan Name: **TEST COUNTY SCHOOLS**

FROM: AXA EQUITABLE LIFE INSURANCE COMPANY
Contract Number (if known): **9001**
Transaction Amount: **\$3,000.00**

TO: GWN SECURITIES
Contract Number (if known): **0123456**
Transaction Amount: **\$3,000.00**

This approval is valid for 45 days. Any reauthorization of this approval must be issued in writing from TSA Consulting Group, Inc. prior to initial expiration.

Amounts authorized may be affected by market fluctuation and/or deferred sales charges if applicable. Final amounts paid may be less than amount authorized.

This Certificate must be signed by the participant and attached to investment provider paperwork for this authorization to be valid.

This authorization is in lieu of signature(s) by the Plan Administrator on the investment provider forms. The investment provider is instructed to execute the specific transaction referenced herein based upon this certificate approval provided that the signature of the participant appears on this form.

TSA Consulting Group, Inc. hereby certifies that this transaction is permitted under the provisions of the employee's plan.

This approval certificate was generated through an online system developed by TSA Consulting Group, Inc. for the exclusive use of TSA Consulting Group clients and participants in those client 407(b) and 407(a) plans. Any use of this certificate by unauthorized parties is prohibited. Fraudulent use of this certificate will result in prosecution of responsible parties.

Signatures

Angela Osborne
Angela Osborne, VP Operations
TSA Consulting Group-TPA

Participant Signature Required
Import Test457

TSA Consulting Group, Inc. - Plan Administrator
Email: recordkeeping@tsacg.com

start 10.110.1.14 - Remot... [Reports] - Windows ... AEFF6CE24A24482B... 11:42 AM

All transactions will be saved in the system and available to the participant for a period of 45 days. All transactions are permanently recorded by TSA Consulting Group. Confirmation of transactions processed by the provider companies are included in the next regular monthly data file forwarded to TSA Consulting Group by the provider company.