How to Add, Edit, and Cancel an SRA

https://artdemo.ipx-sys.com/Home.aspx?section=balances | Retirement Account

File Edit View Favorites Tools Help

Welcome Joe Typical(B) | Log out | Test-EmployerOfficialName

Maximum Allowable Contribution | Last Login: 2/14/2017

ART with IPX technology

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HELP GETTING STARTED

OVERVIEW | PROFILE | INVESTING | SERVICES | PLANNING

Account Overview | Salary Reduction Agreement (SRA) | Funding Your Account(s) | Document Library

Account Overview

BALANCES SOURCES

Your balances by investment provider are listed below. Investment/Annuity balances are displayed in two categories:
1) Investment Provider Xchange (IPX)™ for balances held directly in your account, and
2) Aggregated Records & Transactions (ART) for balances held with investment providers outside your account.
Click on the "+" icon to view additional data.

AGGREGATED RECORD TRANSACTIONS (ART)

PROVIDER / PRODUCT NAME	BALANCE
TestVendor1	$76,385.02

ART TOTAL BALANCE: $76,385.02

DISCLAIMER

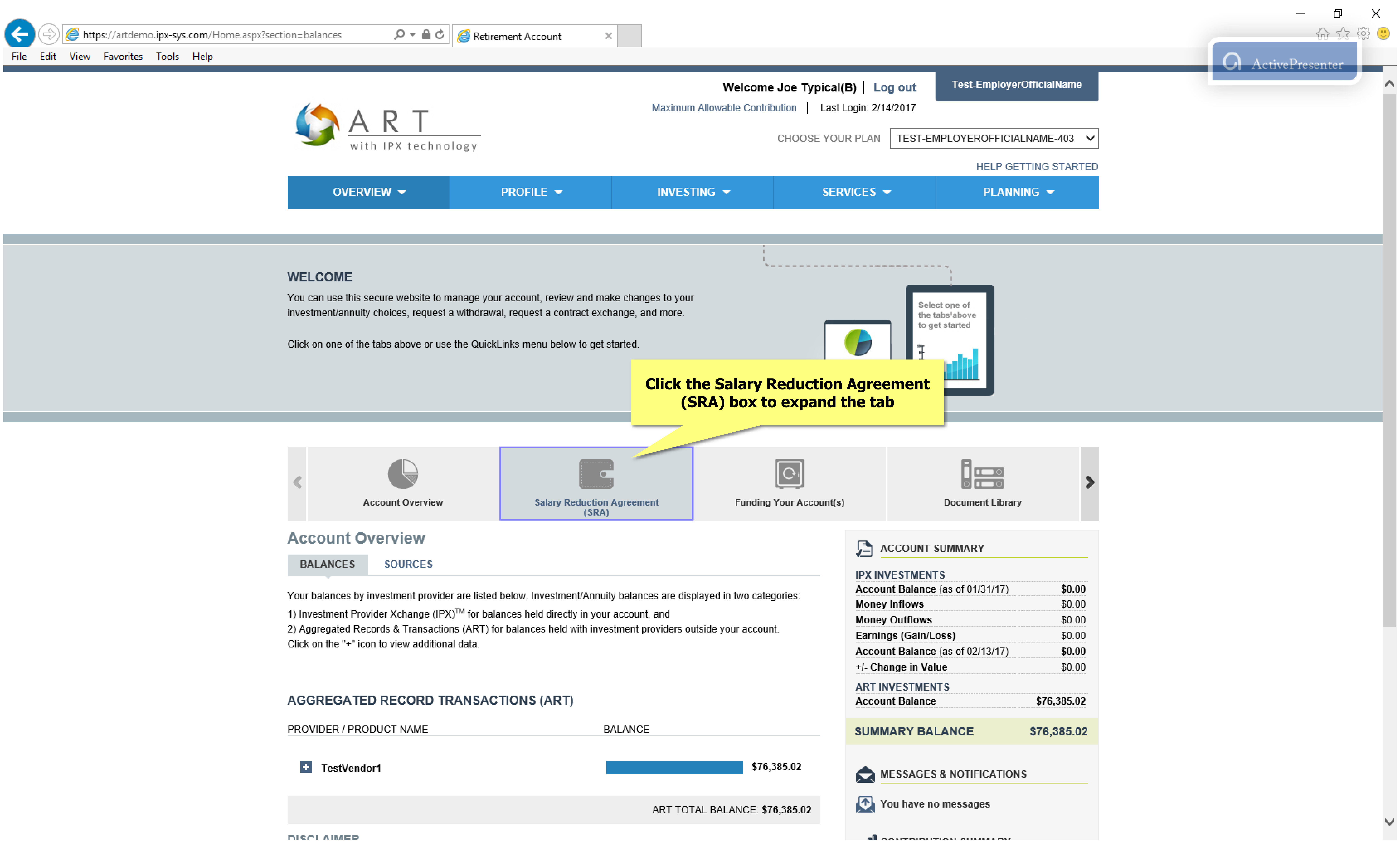
ACCOUNT SUMMARY

IPX INVESTMENTS	
Account Balance (as of 01/31/17)	$0.00
Money Inflows	$0.00
Money Outflows	$0.00
Earnings (Gain/Loss)	$0.00
Account Balance (as of 02/13/17)	$0.00
+/- Change in Value	$0.00
ART INVESTMENTS	
Account Balance	$76,385.02
SUMMARY BALANCE	$76,385.02

MESSAGES & NOTIFICATIONS

You have no messages

CONTRIBUTION SUMMARY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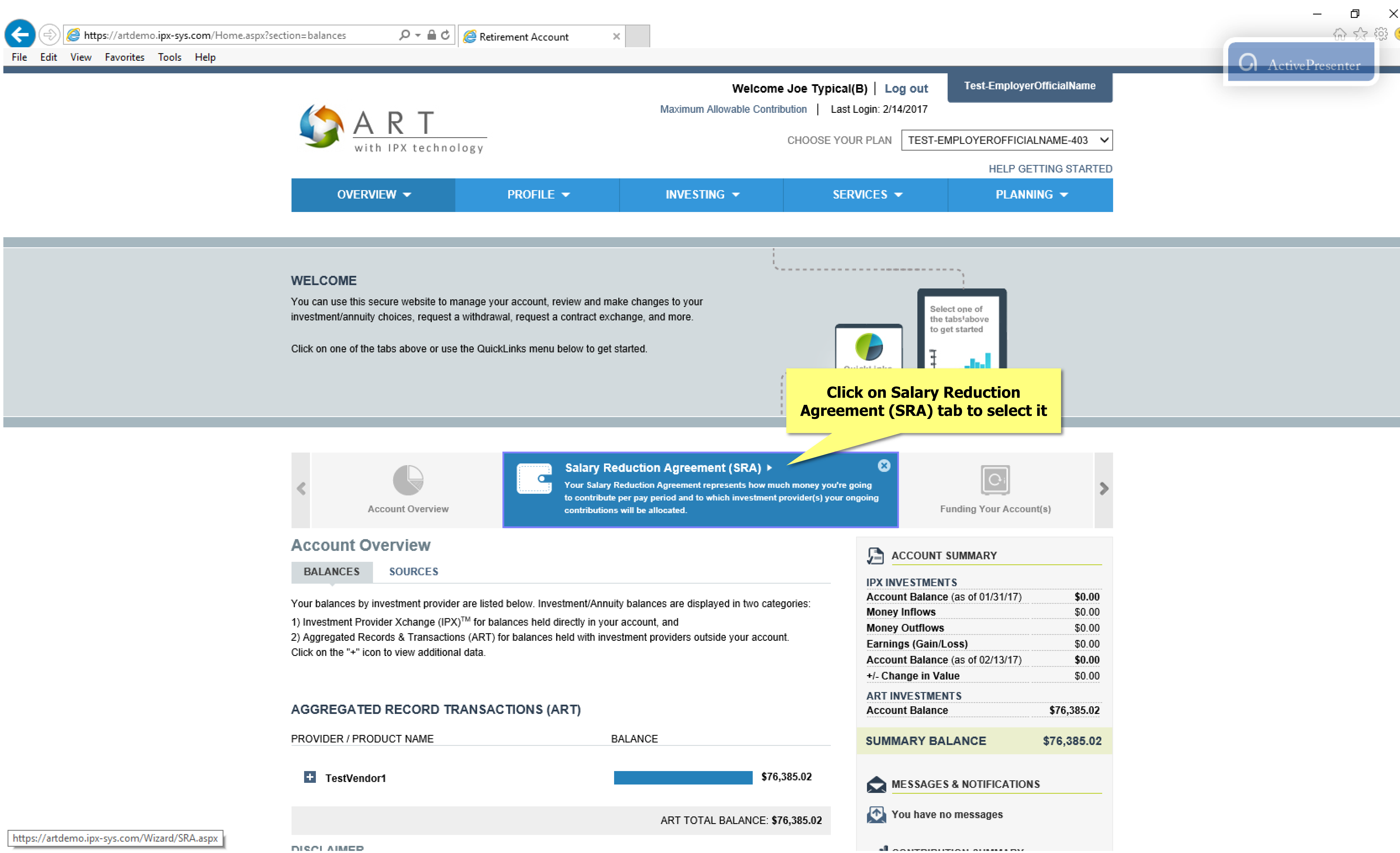
OVERVIEW PROFILE INVESTING SERVICES PLANNING
WELCOME
You can use this secure website to manage your account, review and make changes to your investment/annuity choices, request a withdrawal, request a contract exchange, and more.
Click on one of the tabs above or use the QuickLinks menu below to get started.
Select one of the tabs above to get started
Click the Salary Reduction Agreement (SRA) box to expand the tab
Account Overview
Salary Reduction Agreement (SRA)
Funding Your Account(s)
Document Library
Account Overview
BALANCES SOURCES
Your balances by investment provider are listed below. Investment/Annuity balances are displayed in two categories:
1) Investment Provider Xchange (IPX)TM for balances held directly in your account, and
2) Aggregated Records & Transactions (ART) for balances held with investment providers outside your account.
Click on the "+" icon to view additional data.
AGGREGATED RECORD TRANSACTIONS (ART)
PROVIDER / PRODUCT NAME BALANCE
TestVendor1 $76,385.02
ART TOTAL BALANCE: $76,385.02
ACCOUNT SUMMARY
IPX INVESTMENTS
Account Balance (as of 01/31/17) $0.00
Money Inflows $0.00
Money Outflows $0.00
Earnings (Gain/Loss) $0.00
Account Balance (as of 02/13/17) $0.00
+/- Change in Value $0.00
ART INVESTMENTS
Account Balance $76,385.02
SUMMARY BALANCE $76,385.02
MESSAGES & NOTIFICATIONS
You have no messages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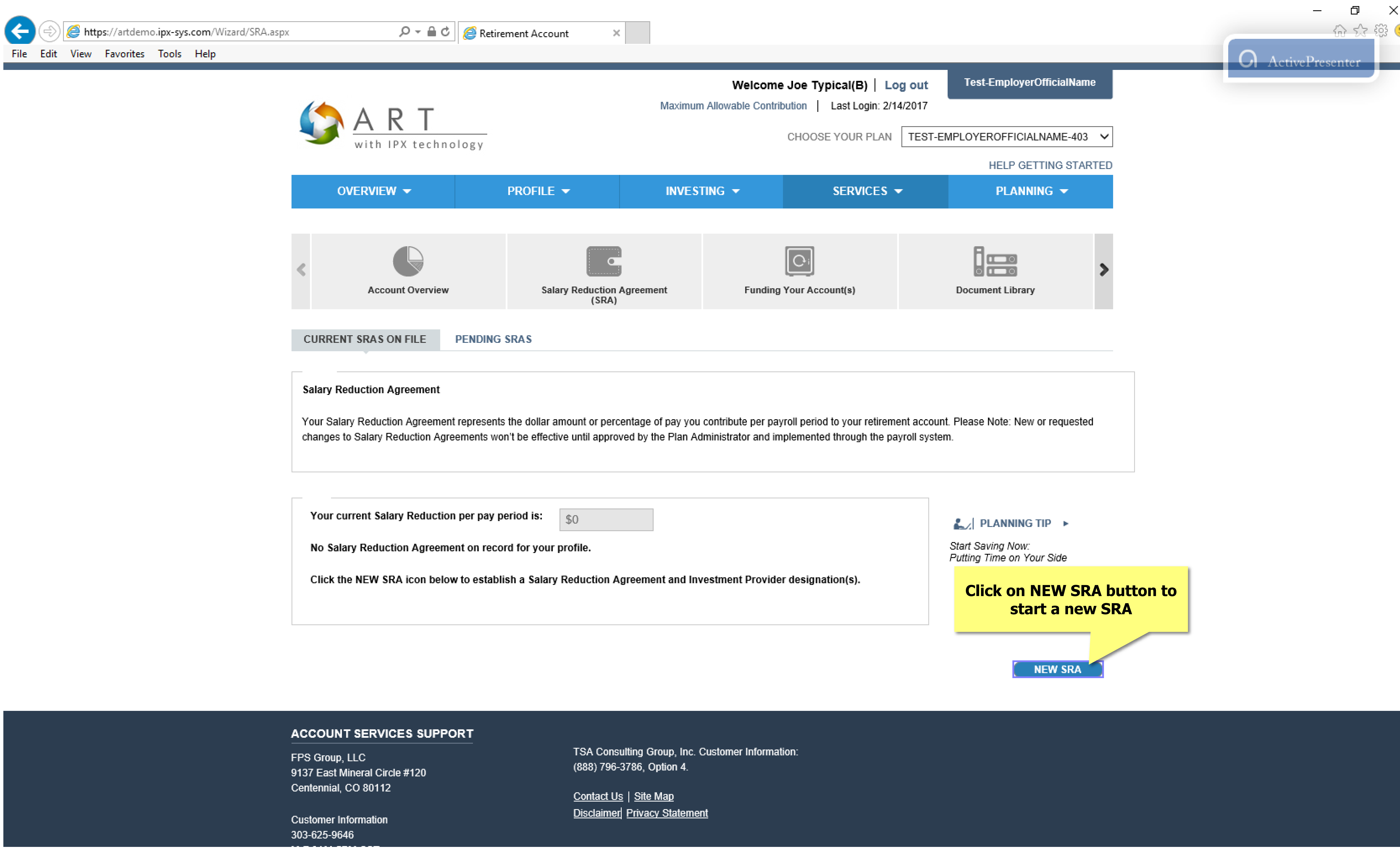
You can use this secure website to manage your account, review and make changes to your investment/annuity choices, request a withdrawal, request a contract exchange, and more.
Click on one of the tabs above or use the QuickLinks menu below to get started.
Select one of the tabs above to get started
Click on Salary Reduction Agreement (SRA) tab to select it
Account Overview
Salary Reduction Agreement (SRA)
Your Salary Reduction Agreement represents how much money you're going to contribute per pay period and to which investment provider(s) your ongoing contributions will be allocated.
Funding Your Account(s)
Account Overview
BALANCES SOURCES
Your balances by investment provider are listed below. Investment/Annuity balances are displayed in two categories:
1) Investment Provider Xchange (IPX)TM for balances held directly in your account, and
2) Aggregated Records & Transactions (ART) for balances held with investment providers outside your account.
Click on the "+" icon to view additional data.
AGGREGATED RECORD TRANSACTIONS (ART)
PROVIDER / PRODUCT NAME BALANCE
TestVendor1 $76,385.02
ART TOTAL BALANCE: $76,385.02
ACCOUNT SUMMARY
IPX INVESTMENTS
Account Balance (as of 01/31/17) $0.00
Money Inflows $0.00
Money Outflows $0.00
Earnings (Gain/Loss) $0.00
Account Balance (as of 02/13/17) $0.00
+/- Change in Value $0.00
ART INVESTMENTS
Account Balance $76,385.02
SUMMARY BALANCE $76,385.02
MESSAGES & NOTIFICATIONS
You have no messages
https://artdemo.ipx-sys.com/Wizard/SRA.aspx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CURRENT SRAS ON FILE
PENDING SRAS
Salary Reduction Agreement
Your Salary Reduction Agreement represents the dollar amount or percentage of pay you contribute per payroll period to your retirement account. Please Note: New or requested changes to Salary Reduction Agreements won't be effective until approved by the Plan Administrator and implemented through the payroll system.
Your current Salary Reduction per pay period is: $0
No Salary Reduction Agreement on record for your profile.
Click the NEW SRA icon below to establish a Salary Reduction Agreement and Investment Provider designation(s).
PLANNING TIP
Start Saving Now: Putting Time on Your Side
Click on NEW SRA button to start a new SRA
NEW SRA
ACCOUNT SERVICES SUPPORT
FPS Group, LLC
9137 East Mineral Circle #120
Centennial, CO 80112
Customer Information
303-625-9646
TSA Consulting Group, Inc. Customer Information:
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Maximum Allowable Contribution | Last Login: 2/15/2017

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HELP GETTING STARTED

OVERVIEW | PROFILE | INVESTING | SERVICES | PLANNING

Account Overview | Salary Reduction Agreement (SRA) | Funding Your Account(s) | Document Library

Salary Reduction Agreement: Step 1 - Contribution Instructions

The Salary Reduction Agreement (SRA) authorizes your employer to withhold either a dollar amount or a percentage of your pay and send it to the investment providers you selected. Please follow the instruction listed below and click CONTINUE to proceed to the next step.

1

Select Source Type: 403(b) Employee Deferral

Your retirement Plan may allow for different contribution source types (pre-tax or Roth/after-tax) that impact the tax treatment of your contributions. For more information regarding contribution source types, visit the online planning center or consult with your financial advisor.

2

Select Method Type: Dollars **Enter Total Dollars:**

Your retirement Plan may allow for different contribution method types (dollars or percentage) per pay period for making salary reduction contributions. The dollar method sets a specific amount per pay period. The percentage method may vary depending on how you're compensated (hourly or salaried) and allows you contribution amount to grow with increases in your pay.

PLANNING TIP ▸

How will payroll deferrals affect my take-home pay?

3

Select Effective Date: 2/15/2017

You may select an effective date in the future for your Salary Deferral contributions to begin. The default date is today's date, and your Salary Reduction contributions will commence on the next payroll cycle after your Salary Reduction Agreement is approved by the Plan Administrator and implemented through the payroll system.

CANCEL CONTINUE

https://artdemo.ipx-sys.com/Wizard/NewSRA.aspx

Retirement Account

File Edit View Favorites Tools Help

(SRA)

Salary Reduction Agreement: Step 1 - Contribution Instructions

The Salary Reduction Agreement (SRA) authorizes your employer to withhold either a dollar amount or a percentage of your pay and send it to the investment providers you selected. Please follow the instruction listed below and click CONTINUE to proceed to the next step.

Click on the down arrow by Source Type to view all source types

1

Select Source Type: 403(b) Employee Deferral

Your retirement Plan may allow for different contribution source types (pre-tax or Roth/after-tax) that impact the tax treatment of your contributions. For more information regarding contribution source types, visit the online planning center or consult with your financial advisor.

2

Select Method Type: Dollars **Enter Total Dollars:**

Your retirement Plan may allow for different contribution method types (dollars or percentage) per pay period for making salary reduction contributions. The dollar method sets a specific amount per pay period. The percentage method may vary depending on how you're compensated (hourly or salaried) and allows you contribution amount to grow with increases in your pay.

PLANNING TIP ▸

How will payroll deferrals affect my take-home pay?

3

Select Effective Date: 2/15/2017

You may select an effective date in the future for your Salary Deferral contributions to begin. The default date is today's date, and your Salary Reduction contributions will commence on the next payroll cycle after your Salary Reduction Agreement is approved by the Plan Administrator and implemented through the payroll system.

CANCEL CONTINUE

ACCOUNT SERVICES SUPPORT

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9137 East Mineral Circle #120
Centennial, CO 80112

Customer Information
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Retirement Account

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(SRA)

Salary Reduction Agreement: Step 1 - Contribution Instructions

The Salary Reduction Agreement (SRA) authorizes your employer to withhold ei [...] end it to the investment providers you selected.
Please follow the instruction listed below and click CONTINUE to proceed to the [...]

Click on the source type for the SRA

1

Select Source Type:

Please Select...
403(b) Employee Deferral
403(b) Employer Matching
403(b) Roth

Your retirement Plan may allow [...] -tax) that impact the tax treatment of your contributions. For more information regarding contribution source types, visit the online planning center or consult with your financial advisor.

2

Select Method Type: Dollars **Enter Total Dollars:**

Your retirement Plan may allow for different contribution method types (dollars or percentage) per pay period for making salary reduction contributions. The dollar method sets a specific amount per pay period. The percentage method may vary depending on how you're compensated (hourly or salaried) and allows you contribution amount to grow with increases in your pay.

PLANNING TIP ▸

How will payroll deferrals affect my take-home pay?

3

Select Effective Date: 2/15/2017

You may select an effective date in the future for your Salary Deferral contributions to begin. The default date is today's date, and your Salary Reduction contributions will commence on the next payroll cycle after your Salary Reduction Agreement is approved by the Plan Administrator and implemented through the payroll system.

CANCEL CONTINUE

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Salary Reduction Agreement: Step 1 - Contribution Instructions

The Salary Reduction Agreement (SRA) authorizes your employer to withhold either a dollar amount or a percentage of your pay and send it to the investment providers you selected. Please follow the instruction listed below and click CONTINUE to proceed to the next step.

1

Select Source Type: 403(b) Employee Deferral

Your retirement Plan may allow for different contribution source types (pre-tax or Roth/after-tax) that impact the tax treatment of your contributions. For more information regarding contribution source types, visit the online planning center or consult with your financial advisor.

Click on the down arrow by Method Type to view all method types

2

Select Method Type: Dollars **Enter Total Dollars:**

Your retirement Plan may allow for different contribution method types (dollars or percentage) per pay period for making salary reduction contributions. The dollar method sets a specific amount per pay period. The percentage method may vary depending on how you're compensated (hourly or salaried) and allows you contribution amount to grow with increases in your pay.

PLANNING TIP ▸

How will payroll deferrals affect my take-home pay?

3

Select Effective Date: 2/15/2017

You may select an effective date in the future for your Salary Deferral contributions to begin. The default date is today's date, and your Salary Reduction contributions will commence on the next payroll cycle after your Salary Reduction Agreement is approved by the Plan Administrator and implemented through the payroll system.

CANCEL CONTINUE

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(SRA)

Salary Reduction Agreement: Step 1 - Contribution Instructions

The Salary Reduction Agreement (SRA) authorizes your employer to withhold either a dollar amount or a percentage of your pay and send it to the investment providers you selected. Please follow the instruction listed below and click CONTINUE to proceed to the next step.

1

Select Source Type: 403(b) Employee Deferral

Your retirement Plan may allow for different contribution source types (pre-tax or Roth/after-tax) that impact the tax treatment of your contributions. For more information regarding contribution source types, visit the online planning center or consult with your financial advisor.

Click on the method type for the SRA

2

Select Method Type: Dollars / Percent **Enter Total Dollars:**

Your retirement Plan may allow for different contribution method types (dollars or percentage) per pay period for making salary reduction contributions. The dollar method sets a specific amount per pay period. The percentage method may vary depending on how you're compensated (hourly or salaried) and allows you contribution amount to grow with increases in your pay.

PLANNING TIP ▸

How will payroll deferrals affect my take-home pay?

3

Select Effective Date: 2/15/2017

You may select an effective date in the future for your Salary Deferral contributions to begin. The default date is today's date, and your Salary Reduction contributions will commence on the next payroll cycle after your Salary Reduction Agreement is approved by the Plan Administrator and implemented through the payroll system.

CANCEL CONTINUE

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Retirement Account

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(SRA)

Salary Reduction Agreement: Step 1 - Contribution Instructions

The Salary Reduction Agreement (SRA) authorizes your employer to withhold either a dollar amount or a percentage of your pay and send it to the investment providers you selected. Please follow the instruction listed below and click CONTINUE to proceed to the next step.

1

Select Source Type: 403(b) Employee Deferral

Your retirement Plan may allow for different contribution source types (pre-tax or Roth/after-tax) that impact the tax treatment of your contributions. For more information regarding contribution source types, visit the online planning center or consult with your financial advisor.

Enter the total amount for your SRA deduction

2

Select Method Type: Dollars **Enter Total Dollars:**

Your retirement Plan may allow for different contribution method types (dollars or percentage) per pay period for making salary reduction contributions. The dollar method sets a specific amount per pay period. The percentage method may vary depending on how you're compensated (hourly or salaried) and allows you contribution amount to grow with increases in your pay.

PLANNING TIP ▸

How will payroll deferrals affect my take-home pay?

3

Select Effective Date: 2/15/2017

You may select an effective date in the future for your Salary Deferral contributions to begin. The default date is today's date, and your Salary Reduction contributions will commence on the next payroll cycle after your Salary Reduction Agreement is approved by the Plan Administrator and implemented through the payroll system.

CANCEL CONTINUE

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(SRA)

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The Salary Reduction Agreement (SRA) authorizes your employer to withhold either a dollar amount or a percentage of your pay and send it to the investment providers you selected. Please follow the instruction listed below and click CONTINUE to proceed to the next step.

1

Select Source Type: 403(b) Employee Deferral

Your retirement Plan may allow for different contribution source types (pre-tax or Roth/after-tax) that impact the tax treatment of your contributions. For more information regarding contribution source types, visit the online planning center or consult with your financial advisor.

2

Select Method Type: Dollars **Enter Total Dollars:** 100.00

Your retirement Plan may allow for different contribution method types (dollars or percentage) per pay period for making salary reduction contributions. The dollar method sets a specific amount per pay period. The percentage method may vary depending on how you're compensated (hourly or salaried) and allows you contribution amount to grow with increases in your pay.

PLANNING TIP ▸

How will payroll deferrals affect my take-home pay?

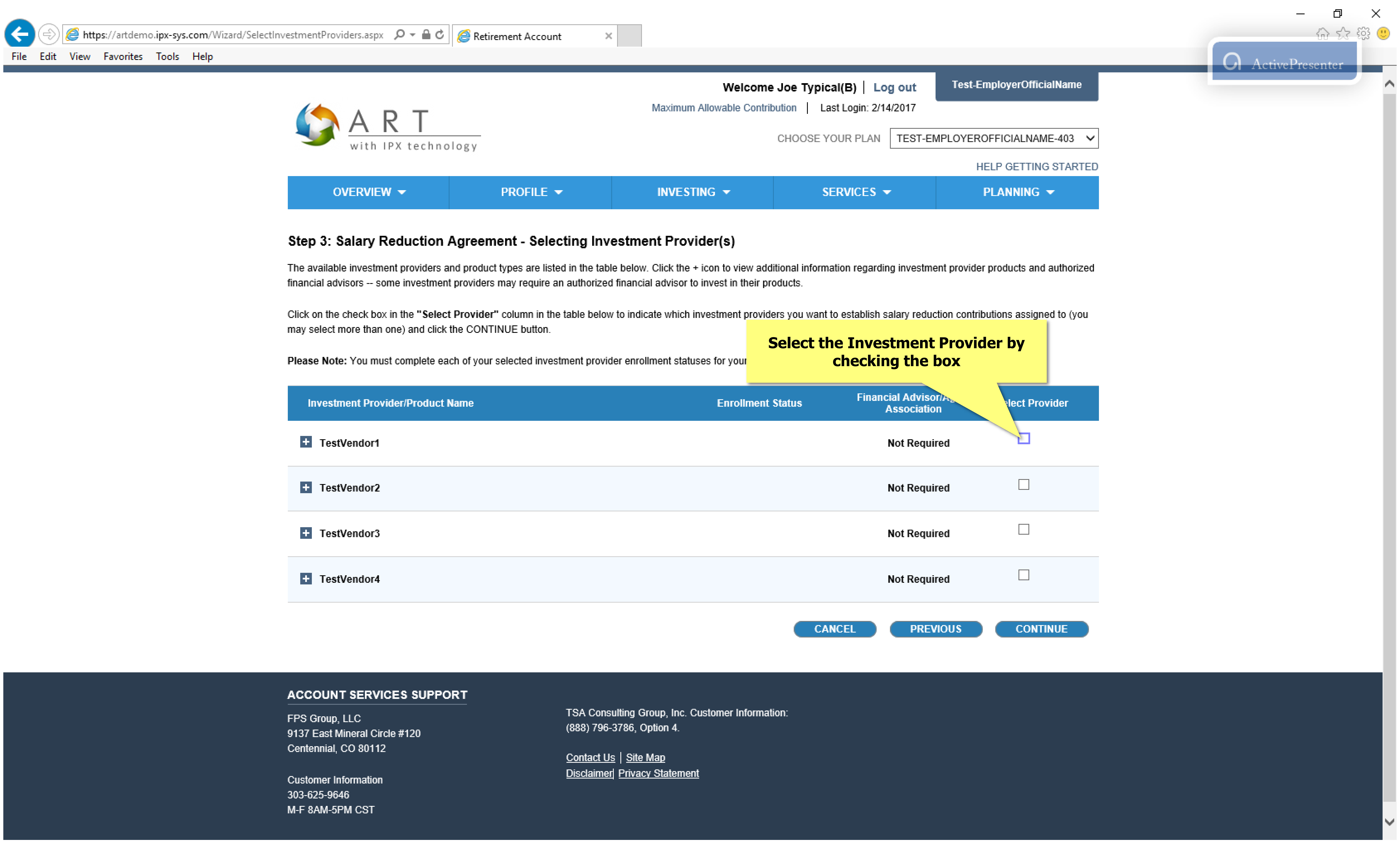
3

Select Effective Date: 2/15/2017

You may select an effective date in the future for your Salary Deferral contributions to begin. The default date is today's date, and your Salary Reduction contributions will commence on the next payroll cycle after your Salary Reduction Agreement is approved by the Plan Administrator and implemented through the payroll system.

Click the CONTINUE button

CANCEL CONTINUE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Step 3: Salary Reduction Agreement - Selecting Investment Provider(s)
The available investment providers and product types are listed in the table below. Click the + icon to view additional information regarding investment provider products and authorized financial advisors -- some investment providers may require an authorized financial advisor to invest in their products.
Click on the check box in the "Select Provider" column in the table below to indicate which investment providers you want to establish salary reduction contributions assigned to (you may select more than one) and click the CONTINUE button.
Please Note: You must complete each of your selected investment provider enrollment statuses for your
Select the Investment Provider by checking the box
Investment Provider/Product Name
Enrollment Status
Financial Advisor/A Association
lect Provider
TestVendor1
Not Required
TestVendor2
Not Required
TestVendor3
Not Required
TestVendor4
Not Required
CANCEL
PREVIOUS
CONTINUE
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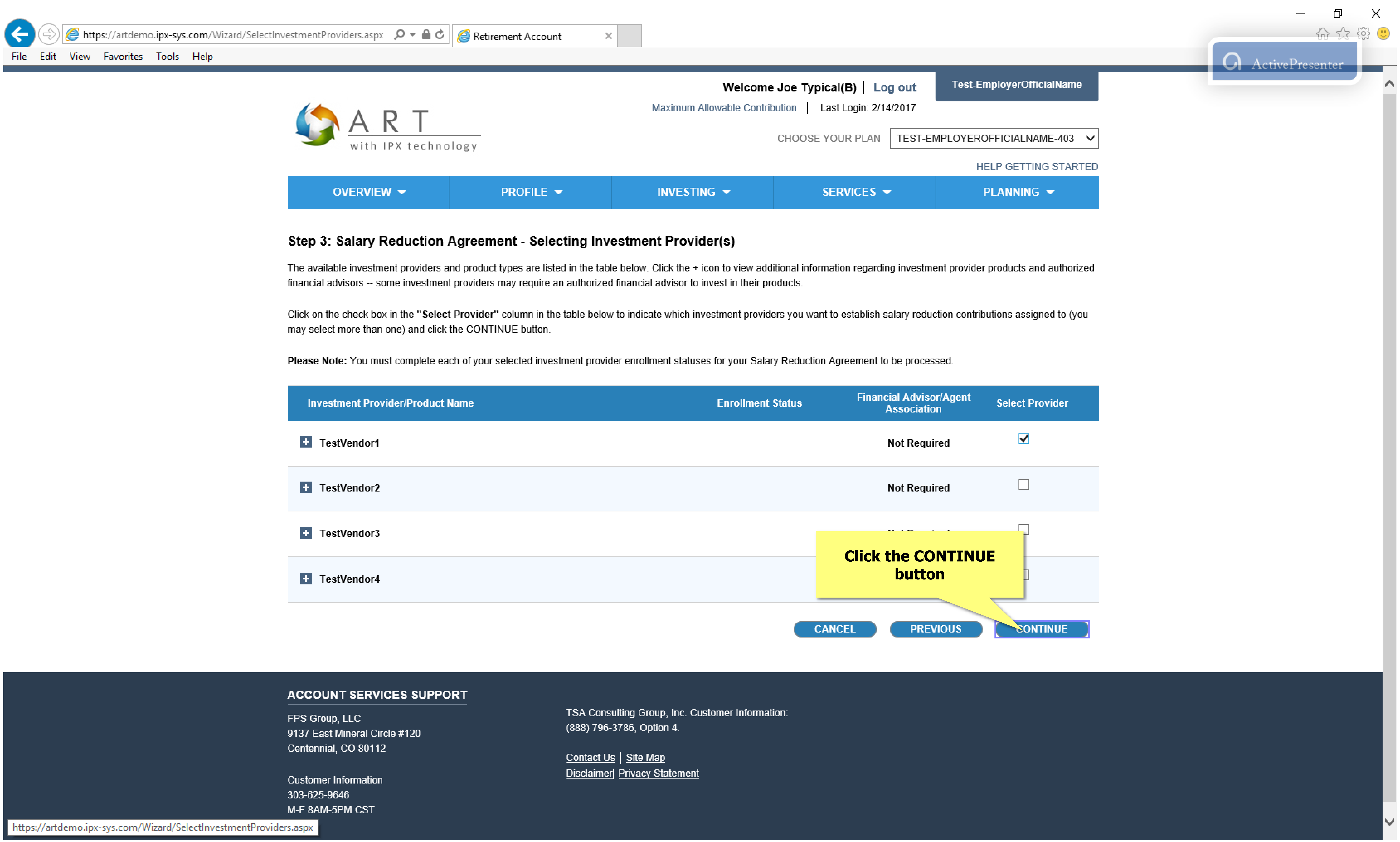
https://artdemo.ipx-sys.com/Wizard/SelectInvestmentProviders.aspx
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Maximum Allowable Contribution | Last Login: 2/14/2017
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Click on the check box in the "Select Provider" column in the table below to indicate which investment providers you want to establish salary reduction contributions assigned to (you may select more than one) and click the CONTINUE button.
Please Note: You must complete each of your selected investment provider enrollment statuses for your Salary Reduction Agreement to be processed.
Investment Provider/Product Name
Enrollment Status
Financial Advisor/Agent Association
Select Provider
TestVendor1
Not Required
TestVendor2
Not Required
TestVendor3
TestVendor4
Click the CONTINUE button
CANCEL
PREVIOUS
CONTINUE
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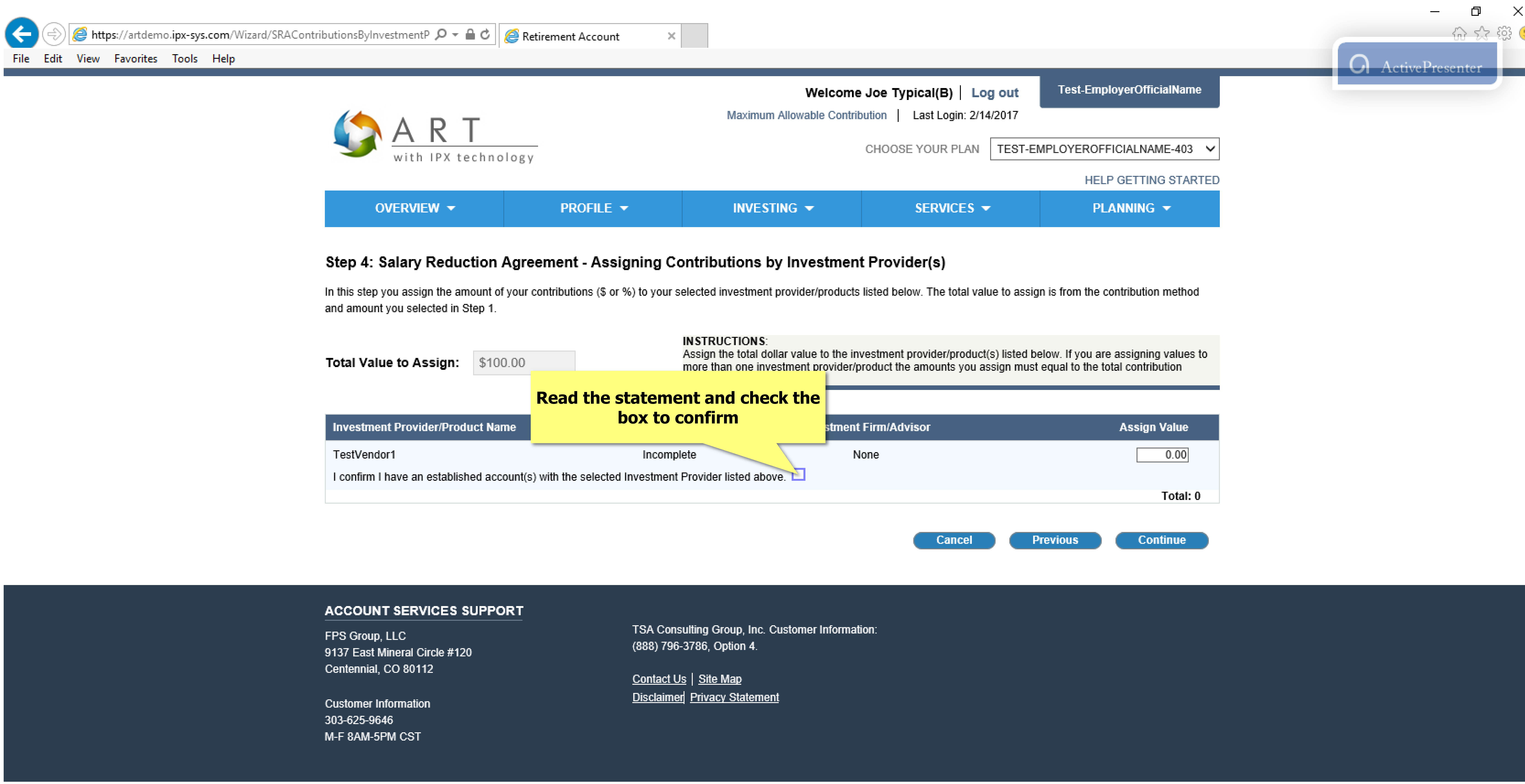
https://artdemo.ipx-sys.com/Wizard/SelectInvestmentProviders.aspx


https://artdemo.ipx-sys.com/Wizard/SRAContributionsByInvestmentP
Retirement Account
File Edit View Favorites Tools Help
ActivePresenter
Welcome Joe Typical(B) | Log out
Test-EmployerOfficialName
Maximum Allowable Contribution | Last Login: 2/14/2017
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Step 4: Salary Reduction Agreement - Assigning Contributions by Investment Provider(s)
In this step you assign the amount of your contributions ($ or %) to your selected investment provider/products listed below. The total value to assign is from the contribution method and amount you selected in Step 1.
Total Value to Assign:
$100.00
INSTRUCTIONS:
Assign the total dollar value to the investment provider/product(s) listed below. If you are assigning values to more than one investment provider/product the amounts you assign must equal to the total contribution
Read the statement and check the box to confirm
Investment Provider/Product Name
stment Firm/Advisor
Assign Value
TestVendor1
Incomplete
None
0.00
I confirm I have an established account(s) with the selected Investment Provider listed above.
Total: 0
Cancel
Previous
Continue
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Centennial, CO 80112
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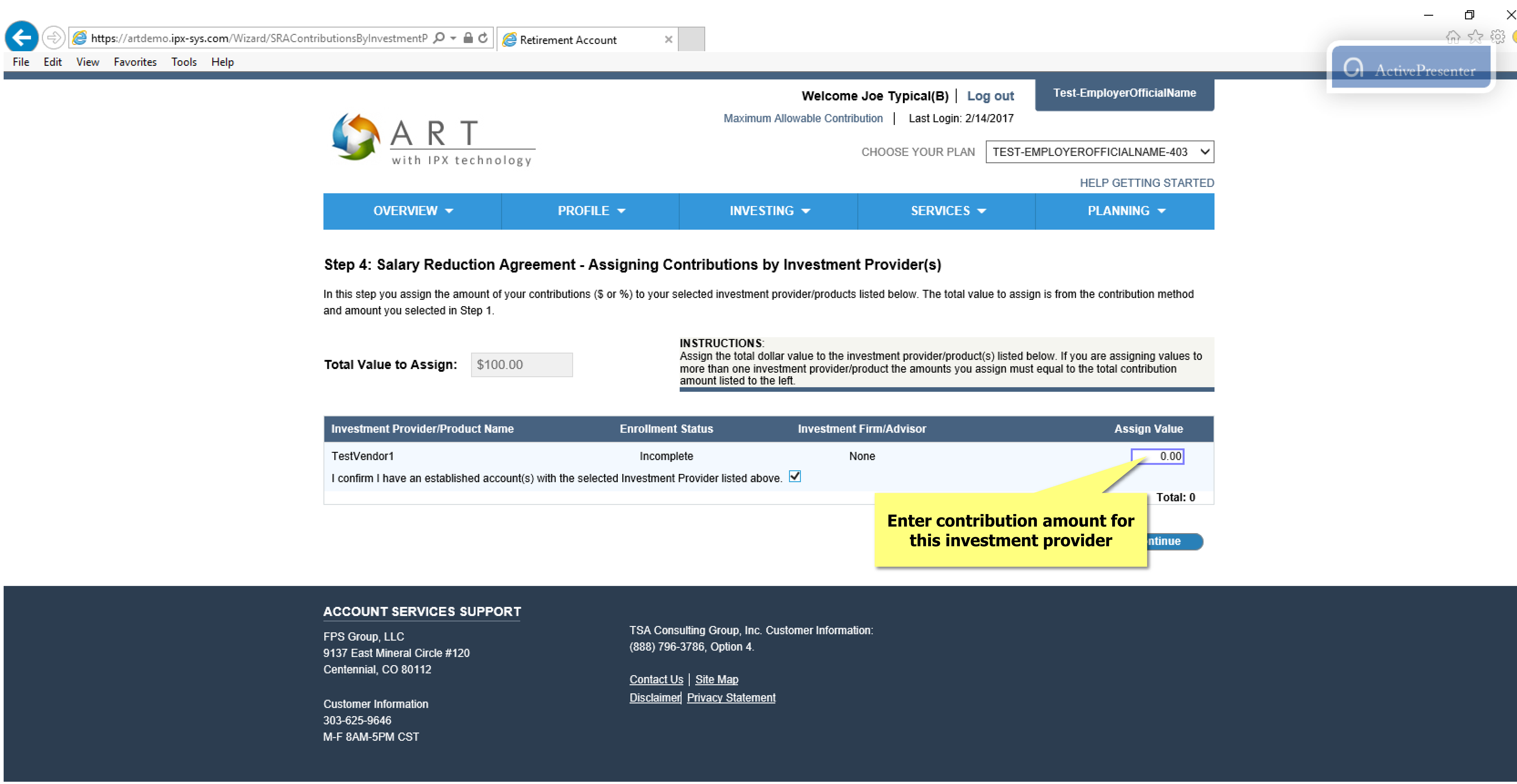
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In this step you assign the amount of your contributions ($ or %) to your selected investment provider/products listed below. The total value to assign is from the contribution method and amount you selected in Step 1.
Total Value to Assign:
$100.00
INSTRUCTIONS:
Assign the total dollar value to the investment provider/product(s) listed below. If you are assigning values to more than one investment provider/product the amounts you assign must equal to the total contribution amount listed to the left.
Investment Provider/Product Name
Enrollment Status
Investment Firm/Advisor
Assign Value
TestVendor1
Incomplete
None
0.00
I confirm I have an established account(s) with the selected Investment Provider listed above.
Total: 0
Enter contribution amount for this investment provider
ntinue
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Centennial, CO 80112
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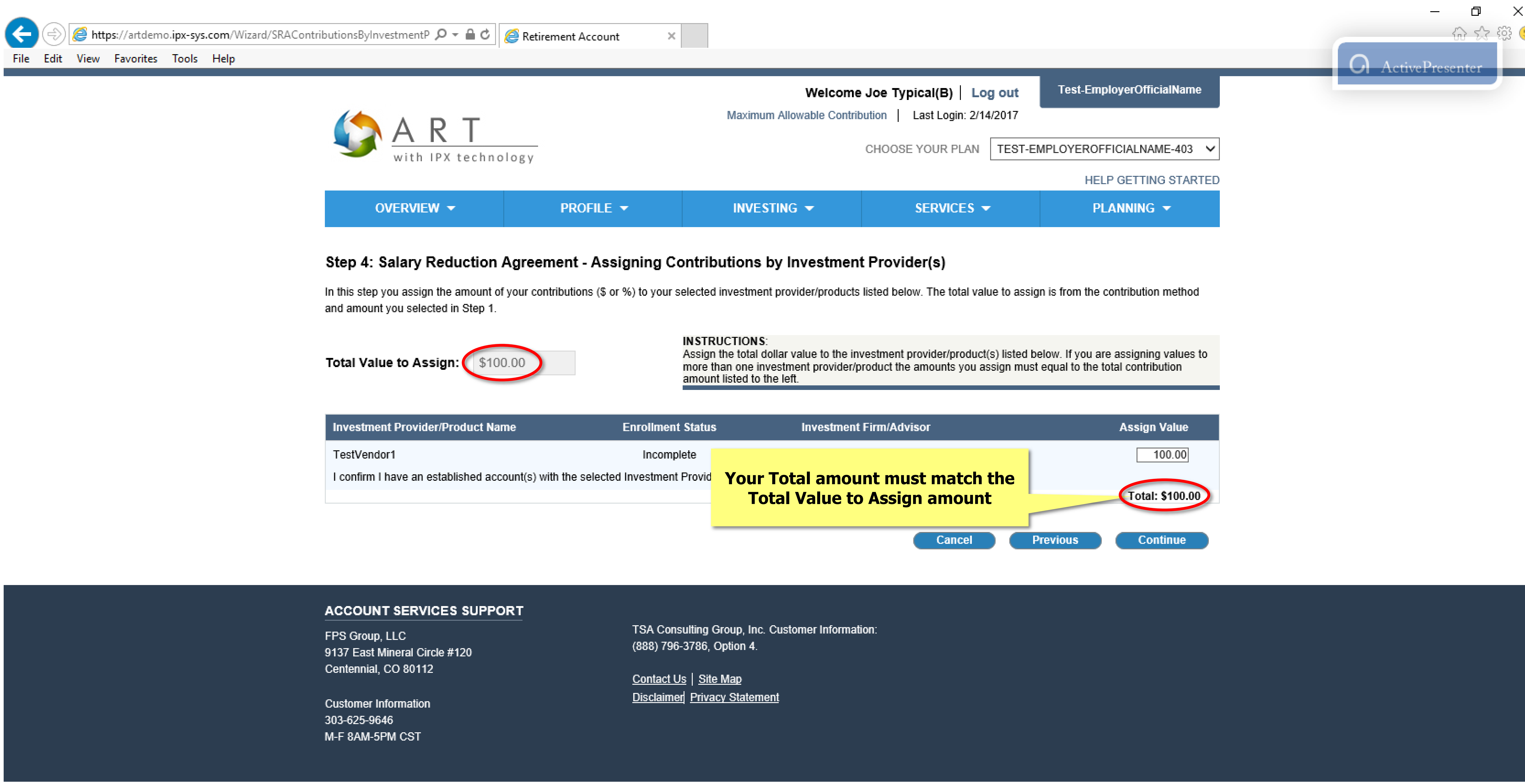
https://artdemo.ipx-sys.com/Wizard/SRAContributionsByInvestmentP
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Test-EmployerOfficialName
Maximum Allowable Contribution | Last Login: 2/14/2017
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HELP GETTING STARTED
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Step 4: Salary Reduction Agreement - Assigning Contributions by Investment Provider(s)
In this step you assign the amount of your contributions ($ or %) to your selected investment provider/products listed below. The total value to assign is from the contribution method and amount you selected in Step 1.
Total Value to Assign: $100.00
INSTRUCTIONS:
Assign the total dollar value to the investment provider/product(s) listed below. If you are assigning values to more than one investment provider/product the amounts you assign must equal to the total contribution amount listed to the left.
Investment Provider/Product Name
Enrollment Status
Investment Firm/Advisor
Assign Value
TestVendor1
Incomplete
100.00
I confirm I have an established account(s) with the selected Investment Provid
Your Total amount must match the Total Value to Assign amount
Total: $100.00
Cancel
Previous
Continue
ACCOUNT SERVICES SUPPORT
FPS Group, LLC
9137 East Mineral Circle #120
Centennial, CO 80112
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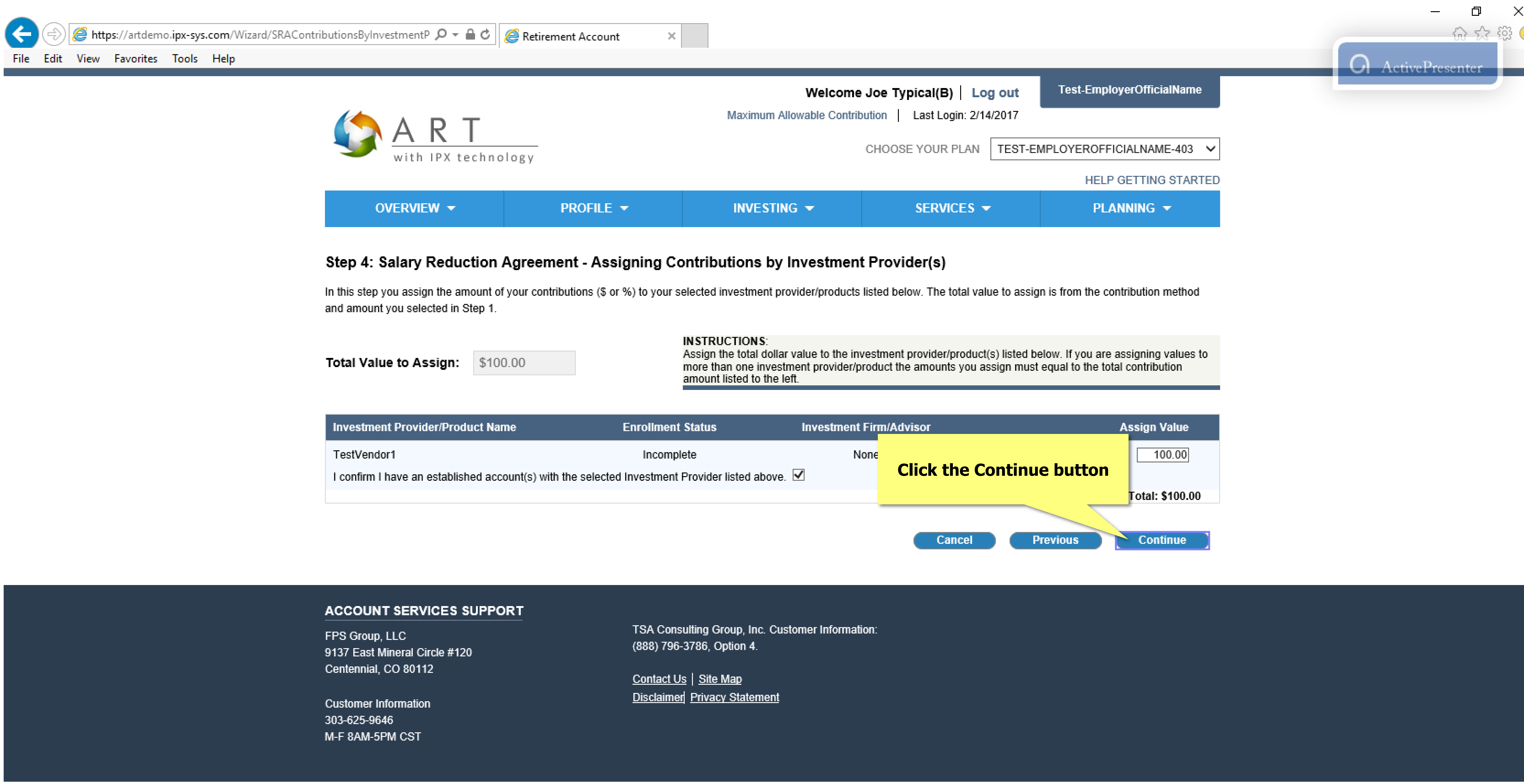
https://artdemo.ipx-sys.com/Wizard/SRAContributionsByInvestmentP
Retirement Account
File Edit View Favorites Tools Help
Welcome Joe Typical(B) | Log out
Test-EmployerOfficialName
Maximum Allowable Contribution | Last Login: 2/14/2017
ART with IPX technology
CHOOSE YOUR PLAN
TEST-EMPLOYEROFFICIALNAME-403
HELP GETTING STARTED
OVERVIEW PROFILE INVESTING SERVICES PLANNING
Step 4: Salary Reduction Agreement - Assigning Contributions by Investment Provider(s)
In this step you assign the amount of your contributions ($ or %) to your selected investment provider/products listed below. The total value to assign is from the contribution method and amount you selected in Step 1.
Total Value to Assign: $100.00
INSTRUCTIONS:
Assign the total dollar value to the investment provider/product(s) listed below. If you are assigning values to more than one investment provider/product the amounts you assign must equal to the total contribution amount listed to the left.
Investment Provider/Product Name
Enrollment Status
Investment Firm/Advisor
Assign Value
TestVendor1
Incomplete
None
100.00
I confirm I have an established account(s) with the selected Investment Provider listed above.
Total: $100.00
Click the Continue button
Cancel
Previous
Continue
ACCOUNT SERVICES SUPPORT
FPS Group, LLC
9137 East Mineral Circle #120
Centennial, CO 80112
Customer Information
303-625-9646
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https://artdemo.ipx-sys.com/Home.aspx?section=balances

Retirement Account

File Edit View Favorites Tools Help

ActivePresenter

Welcome Joe Typical(B) | Log out

Test-EmployerOfficialName

Maximum Allowable Contribution | Last Login: 2/14/2017

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CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403

HELP GETTING STARTED

OVERVIEW PROFILE INVESTING SERVICES PLANNING

Changing an SRA

Account Overview | Salary Reduction Agreement (SRA) | Funding Your Account(s) | Document Library

Account Overview

BALANCES SOURCES

Your balances by investment provider are listed below. Investment/Annuity balances are displayed in two categories:
1) Investment Provider Xchange (IPX)™ for balances held directly in your account, and
2) Aggregated Records & Transactions (ART) for balances held with investment providers outside your account.
Click on the "+" icon to view additional data.

AGGREGATED RECORD TRANSACTIONS (ART)

PROVIDER / PRODUCT NAME	BALANCE
+ TestVendor1	$76,385.02

ART TOTAL BALANCE: $76,385.02

DISCLAIMER

ACCOUNT SUMMARY

IPX INVESTMENTS	
Account Balance (as of 01/31/17)	$0.00
Money Inflows	$0.00
Money Outflows	$0.00
Earnings (Gain/Loss)	$0.00
Account Balance (as of 02/13/17)	$0.00
+/- Change in Value	$0.00
ART INVESTMENTS	
Account Balance	$76,385.02
SUMMARY BALANCE	$76,385.02

MESSAGES & NOTIFICATIONS

You have no messages

CONTRIBUTION SUMMARY

https://artdemo.ipx-sys.com/Home.aspx?section=balances | Retirement Account

File Edit View Favorites Tools Help

Welcome Joe Typical(B) | Log out | Test-EmployerOfficialName

Maximum Allowable Contribution | Last Login: 2/14/2017

ART with IPX technology

CHOOSE YOUR PLAN: TEST-EMPLOYEROFFICIALNAME-403

HELP GETTING STARTED

OVERVIEW | PROFILE | INVESTING | SERVICES | PLANNING

WELCOME

You can use this secure website to manage your account, review and make changes to your investment/annuity choices, request a withdrawal, request a contract exchange, and more.

Click on one of the tabs above or use the QuickLinks menu below to get started.

Select one of the tabs above to get started

Click the Salary Reduction Agreement (SRA) box to expand the tab

Account Overview | Salary Reduction Agreement (SRA) | Funding Your Account(s) | Document Library

Account Overview

BALANCES | SOURCES

Your balances by investment provider are listed below. Investment/Annuity balances are displayed in two categories:
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Click on the "+" icon to view additional data.

AGGREGATED RECORD TRANSACTIONS (ART)

PROVIDER / PRODUCT NAME	BALANCE
TestVendor1	$76,385.02

ART TOTAL BALANCE: $76,385.02

DISCLAIMER

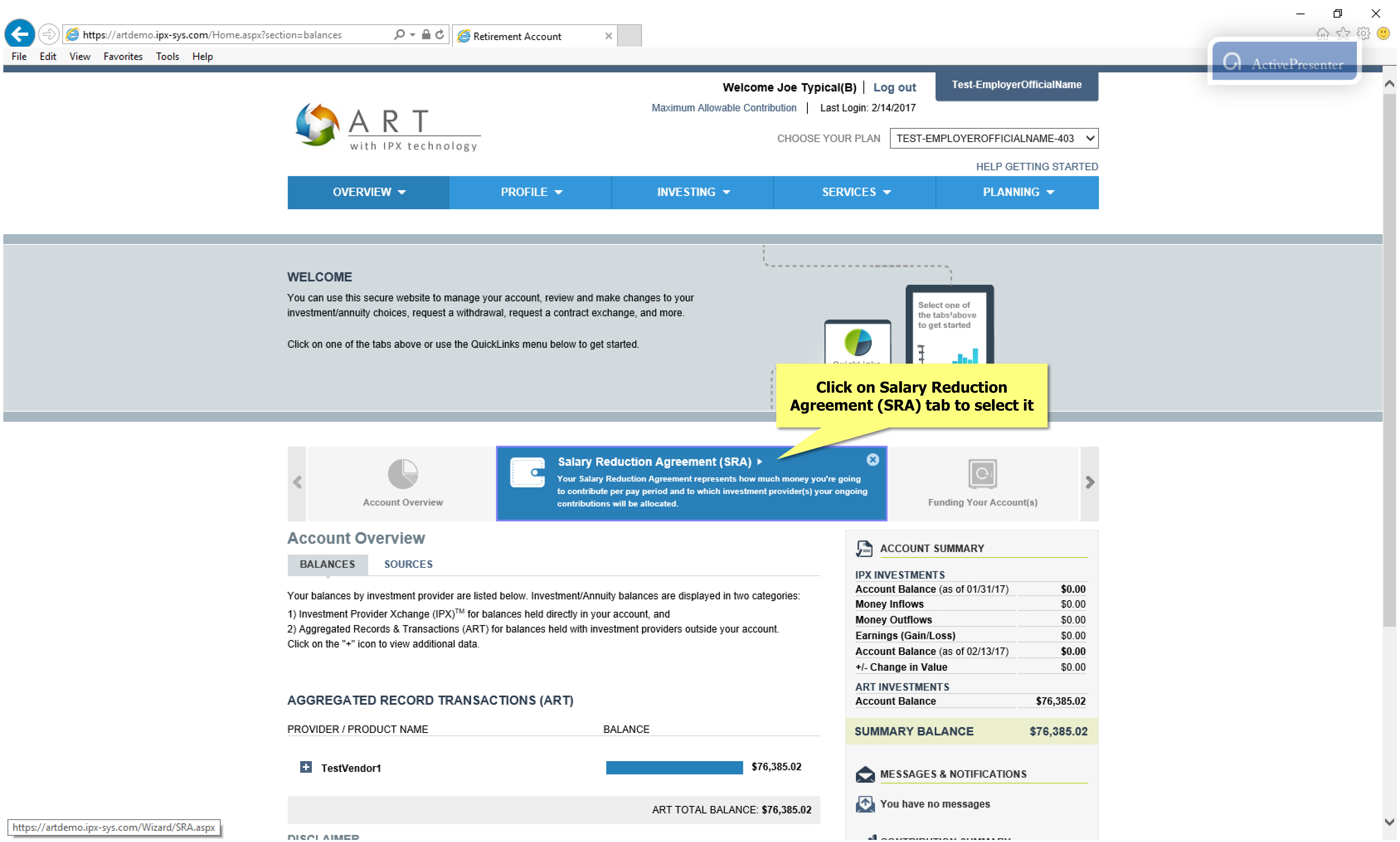
ACCOUNT SUMMARY

IPX INVESTMENTS	
Account Balance (as of 01/31/17)	$0.00
Money Inflows	$0.00
Money Outflows	$0.00
Earnings (Gain/Loss)	$0.00
Account Balance (as of 02/13/17)	$0.00
+/- Change in Value	$0.00
ART INVESTMENTS	
Account Balance	$76,385.02
SUMMARY BALANCE	**$76,385.02**

MESSAGES & NOTIFICATIONS

You have no messages

CONTRIBUTION SUMMARY


https://artdemo.ipx-sys.com/Home.aspx?section=balances
Retirement Account
File Edit View Favorites Tools Help
ActivePresenter
Welcome Joe Typical(B) | Log out
Test-EmployerOfficialName
Maximum Allowable Contribution | Last Login: 2/14/2017
ART with IPX technology
CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403
HELP GETTING STARTED
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PROFILE
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PLANNING
WELCOME
You can use this secure website to manage your account, review and make changes to your investment/annuity choices, request a withdrawal, request a contract exchange, and more.
Click on one of the tabs above or use the QuickLinks menu below to get started.
Select one of the tabs above to get started
Click on Salary Reduction Agreement (SRA) tab to select it
Account Overview
Salary Reduction Agreement (SRA)
Your Salary Reduction Agreement represents how much money you're going to contribute per pay period and to which investment provider(s) your ongoing contributions will be allocated.
Funding Your Account(s)
Account Overview
BALANCES
SOURCES
Your balances by investment provider are listed below. Investment/Annuity balances are displayed in two categories:
1) Investment Provider Xchange (IPX)TM for balances held directly in your account, and
2) Aggregated Records & Transactions (ART) for balances held with investment providers outside your account.
Click on the "+" icon to view additional data.
AGGREGATED RECORD TRANSACTIONS (ART)
PROVIDER / PRODUCT NAME
BALANCE
TestVendor1
$76,385.02
ART TOTAL BALANCE: $76,385.02
ACCOUNT SUMMARY
IPX INVESTMENTS
Account Balance (as of 01/31/17) $0.00
Money Inflows $0.00
Money Outflows $0.00
Earnings (Gain/Loss) $0.00
Account Balance (as of 02/13/17) $0.00
+/- Change in Value $0.00
ART INVESTMENTS
Account Balance $76,385.02
SUMMARY BALANCE $76,385.02
MESSAGES & NOTIFICATIONS
You have no messages
https://artdemo.ipx-sys.com/Wizard/SRA.aspx

https://artdemo.ipx-sys.com/Wizard/SRA.aspx | Retirement Account

File Edit View Favorites Tools Help

ART with IPX technology

Maximum Allowable Contribution | Last Login: 2/15/2017

CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403

HELP GETTING STARTED

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Account Overview | Salary Reduction Agreement (SRA) | Funding Your Account(s) | Document Library

CURRENT SRAS ON FILE | PENDING SRAS

Salary Reduction Agreement

Your Salary Reduction Agreement represents the dollar amount or percentage of pay you contribute per payroll period to your retirement account. Please Note: New or requested changes to Salary Reduction Agreements won't be effective until approved by the Plan Administrator and implemented through the payroll system.

Salary Reduction Agreements (SRAs) are established by contribution source type (pre-tax and after-tax roth) based on your Plan provisions. If you have established SRAs for both contribution source types use the drop down menu to view the details of each SRA on file.

Your current Salary Reduction by Source: Employee Deferral

Current Salary Reduction for this Source type: $100.00

The amount/percentage to the contribution source above is allocated to the investment provider/products listed in the table below. To change your current Salary Reduction Agreement click on the EDIT icon. To establish a new Salary Reduction Agreement click on NEW SRA. **To cease Salary Reduction contributions click on the CANCEL SRA icon.**

INVESTMENT PROVIDER/PRODUCT NAME	SOURCE TYPE	AMOUNT/PERCENT
TestVendor1	Employee Deferral	$100.00

Total:$100.00

CANCEL SRA | NEW SRA | EDIT SRA

https://artdemo.ipx-sys.com/Wizard/SRA.aspx

Retirement Account

File Edit View Favorites Tools Help

ActivePresenter

(SRA)

CURRENT SRAS ON FILE | PENDING SRAS

Salary Reduction Agreement

Your Salary Reduction Agreement represents the dollar amount or percentage of pay you contribute per payroll period to your retirement account. Please Note: New or requested changes to Salary Reduction Agreements won't be effective until approved by the Plan Administrator and implemented through the payroll system.

Salary Reduction Agreements (SRAs) are established by contribution source type (pre-tax and after-tax roth) based on your Plan provisions. If you have established SRAs for both contribution source types use the drop down menu to view the details of each SRA on file.

Your current Salary Reduction by Source: Employee Deferral

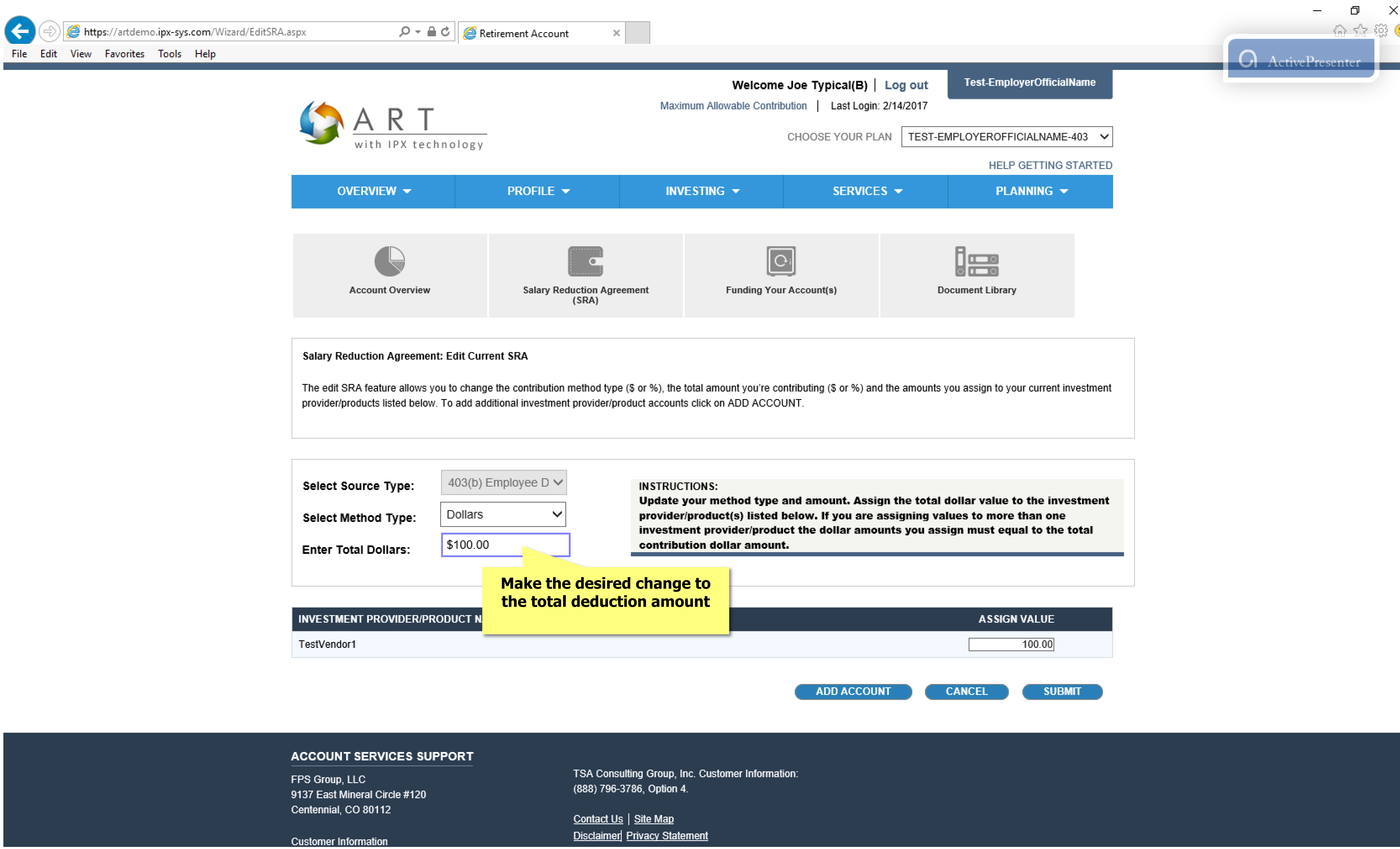
Current Salary Reduction for this Source type: $100.00

The amount/percentage to the contribution source above is allocated to the investment provider/products listed in the table below. To change your current Salary Reduction Agreement click on the EDIT icon. To establish a new Salary Reduction Agreement click on NEW SRA. **To cease Salary Reduction contributions click on the CANCEL SRA icon.**

INVESTMENT PROVIDER/PRODUCT NAME	SOURCE TYPE	AMOUNT/PERCENT
TestVendor1	Employee Deferral	$100.00
		Total:$100.00

Click the EDIT SRA button

CANCEL SRA | NEW SRA | EDIT SRA


https://artdemo.ipx-sys.com/Wizard/EditSRA.aspx
Retirement Account
File Edit View Favorites Tools Help
Welcome Joe Typical(B) | Log out
Test-EmployerOfficialName
Maximum Allowable Contribution | Last Login: 2/14/2017
ART with IPX technology
CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403
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Salary Reduction Agreement: Edit Current SRA
The edit SRA feature allows you to change the contribution method type ($ or %), the total amount you're contributing ($ or %) and the amounts you assign to your current investment provider/products listed below. To add additional investment provider/product accounts click on ADD ACCOUNT.
Select Source Type: 403(b) Employee D
Select Method Type: Dollars
Enter Total Dollars: $100.00
INSTRUCTIONS:
Update your method type and amount. Assign the total dollar value to the investment provider/product(s) listed below. If you are assigning values to more than one investment provider/product the dollar amounts you assign must equal to the total contribution dollar amount.
Make the desired change to the total deduction amount
INVESTMENT PROVIDER/PRODUCT N
ASSIGN VALUE
TestVendor1
100.00
ADD ACCOUNT CANCEL SUBMIT
ACCOUNT SERVICES SUPPORT
FPS Group, LLC
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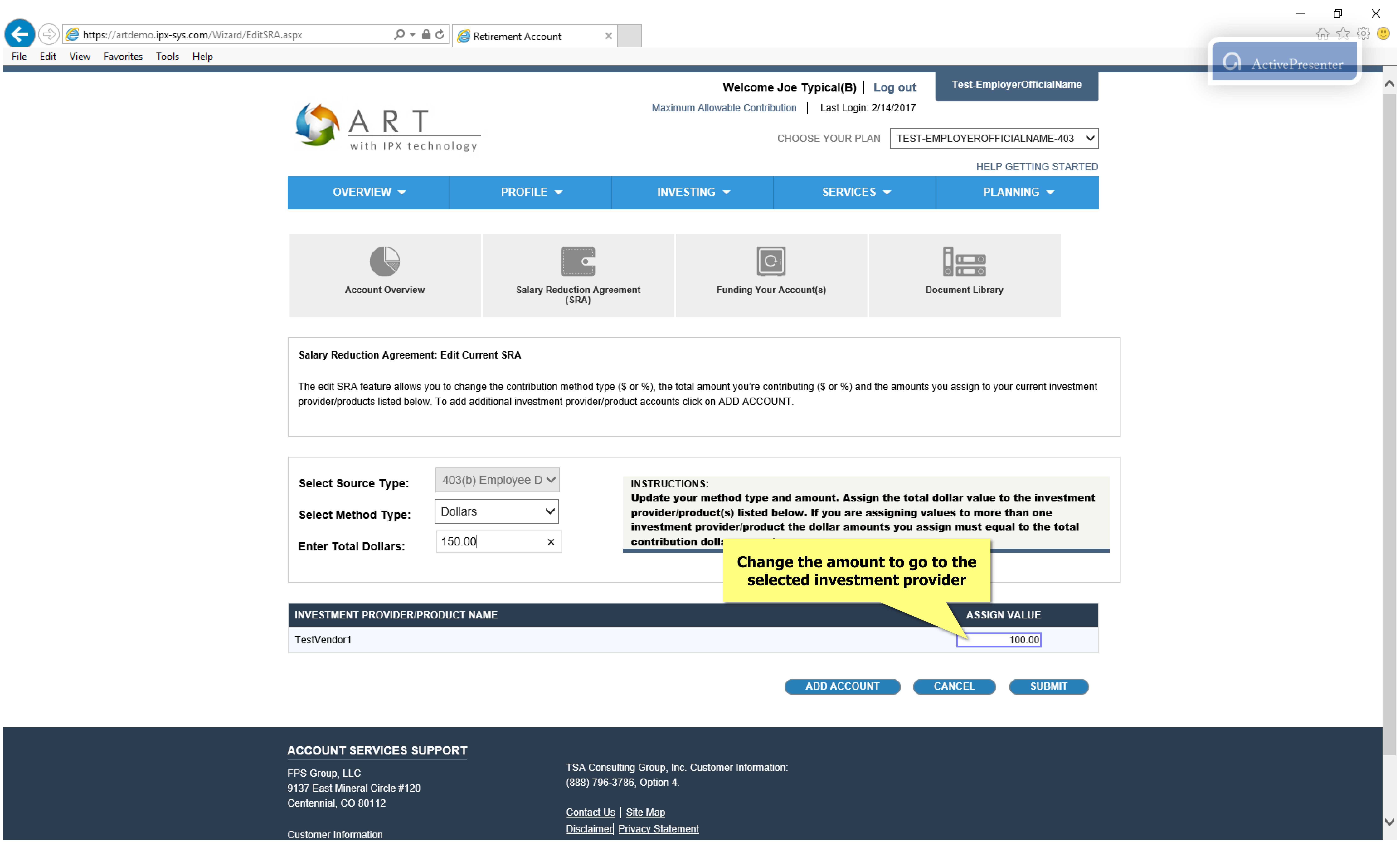

https://artdemo.ipx-sys.com/Wizard/EditSRA.aspx
Retirement Account
File Edit View Favorites Tools Help
ActivePresenter
Welcome Joe Typical(B) | Log out
Test-EmployerOfficialName
Maximum Allowable Contribution | Last Login: 2/14/2017
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Salary Reduction Agreement: Edit Current SRA
The edit SRA feature allows you to change the contribution method type ($ or %), the total amount you're contributing ($ or %) and the amounts you assign to your current investment provider/products listed below. To add additional investment provider/product accounts click on ADD ACCOUNT.
Select Source Type: 403(b) Employee D
Select Method Type: Dollars
Enter Total Dollars: 150.00
INSTRUCTIONS:
Update your method type and amount. Assign the total dollar value to the investment provider/product(s) listed below. If you are assigning values to more than one investment provider/product the dollar amounts you assign must equal to the total contribution doll
Change the amount to go to the selected investment provider
INVESTMENT PROVIDER/PRODUCT NAME
ASSIGN VALUE
TestVendor1
100.00
ADD ACCOUNT
CANCEL
SUBMIT
ACCOUNT SERVICES SUPPORT
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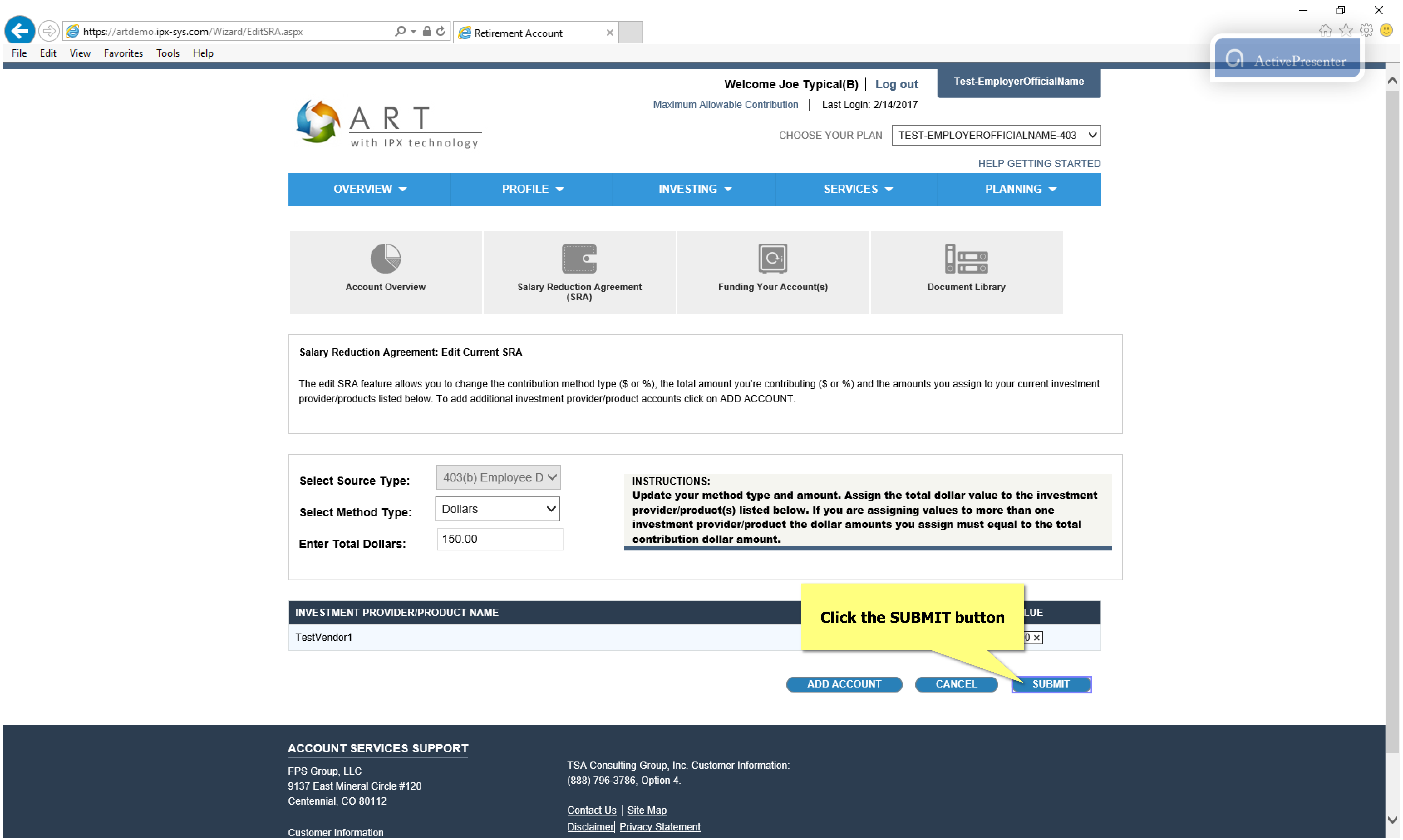

https://artdemo.ipx-sys.com/Wizard/EditSRA.aspx
Retirement Account
File Edit View Favorites Tools Help
ActivePresenter
Welcome Joe Typical(B) | Log out
Test-EmployerOfficialName
Maximum Allowable Contribution | Last Login: 2/14/2017
A R T
with IPX technology
CHOOSE YOUR PLAN
TEST-EMPLOYEROFFICIALNAME-403
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Account Overview
Salary Reduction Agreement (SRA)
Funding Your Account(s)
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Salary Reduction Agreement: Edit Current SRA
The edit SRA feature allows you to change the contribution method type ($ or %), the total amount you're contributing ($ or %) and the amounts you assign to your current investment provider/products listed below. To add additional investment provider/product accounts click on ADD ACCOUNT.
Select Source Type:
403(b) Employee D
Select Method Type:
Dollars
Enter Total Dollars:
150.00
INSTRUCTIONS:
Update your method type and amount. Assign the total dollar value to the investment provider/product(s) listed below. If you are assigning values to more than one investment provider/product the dollar amounts you assign must equal to the total contribution dollar amount.
INVESTMENT PROVIDER/PRODUCT NAME
LUE
TestVendor1
Click the SUBMIT button
ADD ACCOUNT
CANCEL
SUBMIT
ACCOUNT SERVICES SUPPORT
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9137 East Mineral Circle #120
Centennial, CO 80112
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Retirement Account
File Edit View Favorites Tools Help

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Welcome Joe Typical(B) | Log out
Test-EmployerOfficialName
Maximum Allowable Contribution | Last Login: 2/14/2017
CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403
HELP GETTING STARTED

OVERVIEW PROFILE INVESTING SERVICES PLANNING

SRA Enrollment Completed

You have completed SRA Enrollment. Please click here to print a copy of your Salary Reduction Agreement for your records.

If you would like the PDF of the SRA, click here

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https://artdemo.ipx-sys.com/Home.aspx?section=balances

Retirement Account

File Edit View Favorites Tools Help

Welcome Joe Typical(B) | Log out

Test-EmployerOfficialName

Maximum Allowable Contribution | Last Login: 2/14/2017

ART with IPX technology

CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403

HELP GETTING STARTED

OVERVIEW PROFILE INVESTING SERVICES PLANNING

Canceling an SRA

Account Overview | Salary Reduction Agreement (SRA) | Funding Your Account(s) | Document Library

Account Overview

BALANCES SOURCES

Your balances by investment provider are listed below. Investment/Annuity balances are displayed in two categories:
1) Investment Provider Xchange (IPX)™ for balances held directly in your account, and
2) Aggregated Records & Transactions (ART) for balances held with investment providers outside your account.
Click on the "+" icon to view additional data.

AGGREGATED RECORD TRANSACTIONS (ART)

PROVIDER / PRODUCT NAME	BALANCE
TestVendor1	$76,385.02

ART TOTAL BALANCE: $76,385.02

DISCLAIMER

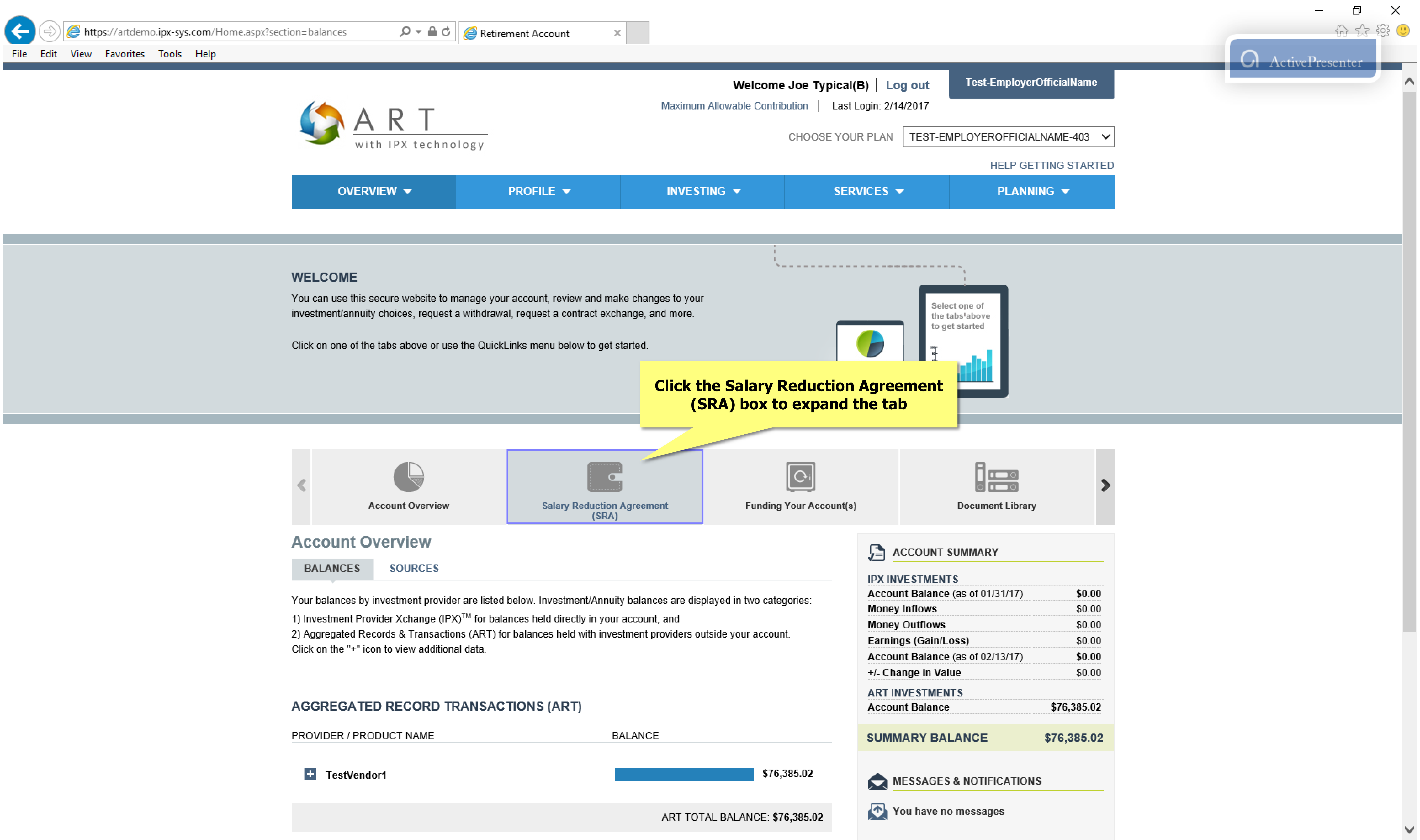
ACCOUNT SUMMARY

IPX INVESTMENTS	
Account Balance (as of 01/31/17)	$0.00
Money Inflows	$0.00
Money Outflows	$0.00
Earnings (Gain/Loss)	$0.00
Account Balance (as of 02/13/17)	$0.00
+/- Change in Value	$0.00
ART INVESTMENTS	
Account Balance	$76,385.02
SUMMARY BALANCE	**$76,385.02**

MESSAGES & NOTIFICATIONS

You have no messages

CONTRIBUTION SUMMARY


https://artdemo.ipx-sys.com/Home.aspx?section=balances
Retirement Account
File Edit View Favorites Tools Help
ActivePresenter
Welcome Joe Typical(B) | Log out
Test-EmployerOfficialName
Maximum Allowable Contribution | Last Login: 2/14/2017
ART with IPX technology
CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403
HELP GETTING STARTED
OVERVIEW PROFILE INVESTING SERVICES PLANNING
WELCOME
You can use this secure website to manage your account, review and make changes to your investment/annuity choices, request a withdrawal, request a contract exchange, and more.
Click on one of the tabs above or use the QuickLinks menu below to get started.
Select one of the tabs above to get started
Click the Salary Reduction Agreement (SRA) box to expand the tab
Account Overview
Salary Reduction Agreement (SRA)
Funding Your Account(s)
Document Library
Account Overview
BALANCES SOURCES
Your balances by investment provider are listed below. Investment/Annuity balances are displayed in two categories:
1) Investment Provider Xchange (IPX)TM for balances held directly in your account, and
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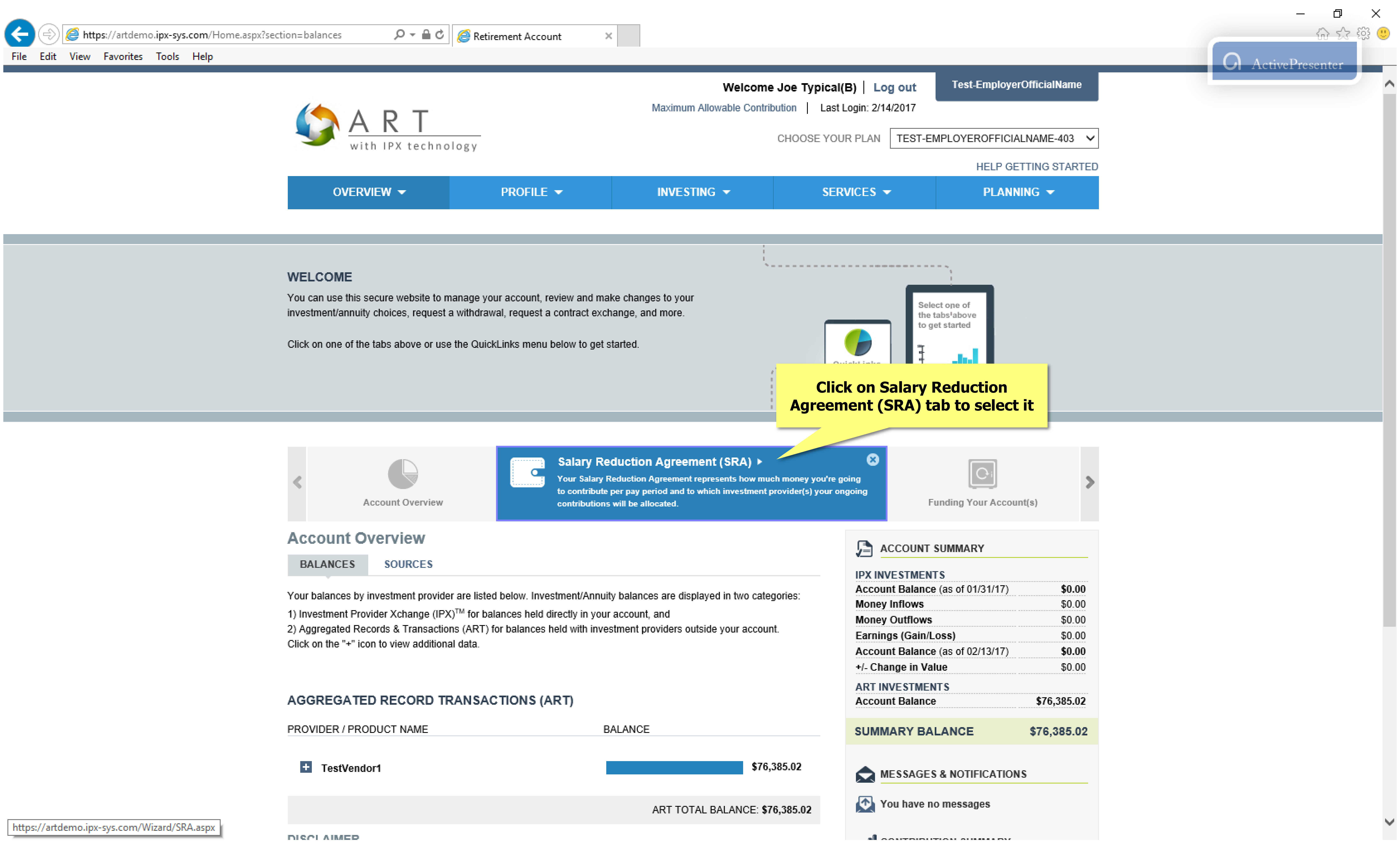
Click on the "+" icon to view additional data.
AGGREGATED RECORD TRANSACTIONS (ART)
PROVIDER / PRODUCT NAME BALANCE
TestVendor1 $76,385.02
ART TOTAL BALANCE: $76,385.02
ACCOUNT SUMMARY
IPX INVESTMENTS
Account Balance (as of 01/31/17) $0.00
Money Inflows $0.00
Money Outflows $0.00
Earnings (Gain/Loss) $0.00
Account Balance (as of 02/13/17) $0.00
+/- Change in Value $0.00
ART INVESTMENTS
Account Balance $76,385.02
SUMMARY BALANCE $76,385.02
MESSAGES & NOTIFICATIONS
You have no messages


https://artdemo.ipx-sys.com/Home.aspx?section=balances
Retirement Account
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Welcome Joe Typical(B) | Log out
Test-EmployerOfficialName
Maximum Allowable Contribution | Last Login: 2/14/2017
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CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403
HELP GETTING STARTED
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Click on one of the tabs above or use the QuickLinks menu below to get started.
Select one of the tabs above to get started
Click on Salary Reduction Agreement (SRA) tab to select it
Account Overview
Salary Reduction Agreement (SRA)
Your Salary Reduction Agreement represents how much money you're going to contribute per pay period and to which investment provider(s) your ongoing contributions will be allocated.
Funding Your Account(s)
Account Overview
BALANCES SOURCES
Your balances by investment provider are listed below. Investment/Annuity balances are displayed in two categories:
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2) Aggregated Records & Transactions (ART) for balances held with investment providers outside your account.
Click on the "+" icon to view additional data.
AGGREGATED RECORD TRANSACTIONS (ART)
PROVIDER / PRODUCT NAME BALANCE
TestVendor1 $76,385.02
ART TOTAL BALANCE: $76,385.02
ACCOUNT SUMMARY
IPX INVESTMENTS
Account Balance (as of 01/31/17) $0.00
Money Inflows $0.00
Money Outflows $0.00
Earnings (Gain/Loss) $0.00
Account Balance (as of 02/13/17) $0.00
+/- Change in Value $0.00
ART INVESTMENTS
Account Balance $76,385.02
SUMMARY BALANCE $76,385.02
MESSAGES & NOTIFICATIONS
You have no messages
https://artdemo.ipx-sys.com/Wizard/SRA.aspx

https://artdemo.ipx-sys.com/Wizard/SRA.aspx
Retirement Account

File Edit View Favorites Tools Help

ART with IPX technology

CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403

HELP GETTING STARTED

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Account Overview | Salary Reduction Agreement (SRA) | Funding Your Account(s) | Document Library

CURRENT SRAS ON FILE | PENDING SRAS

Salary Reduction Agreement

Your Salary Reduction Agreement represents the dollar amount or percentage of pay you contribute per payroll period to your retirement account. Please Note: New or requested changes to Salary Reduction Agreements won't be effective until approved by the Plan Administrator and implemented through the payroll system.

Salary Reduction Agreements (SRAs) are established by contribution source type (pre-tax and after-tax roth) based on your Plan provisions. If you have established SRAs for both contribution source types use the drop down menu to view the details of each SRA on file.

Your current Salary Reduction by Source: Employee Deferral

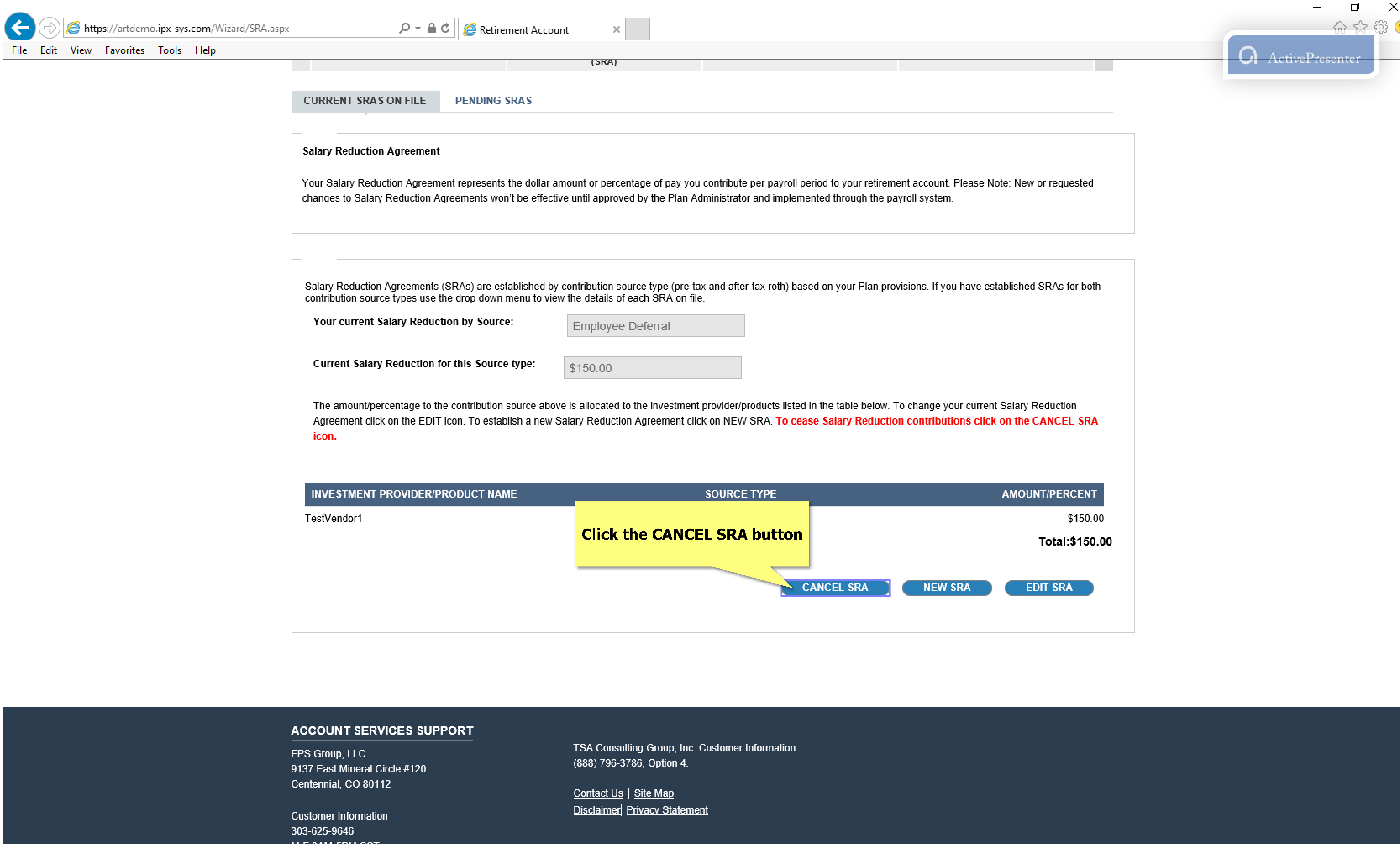
Current Salary Reduction for this Source type: $150.00

The amount/percentage to the contribution source above is allocated to the investment provider/products listed in the table below. To change your current Salary Reduction Agreement click on the EDIT icon. To establish a new Salary Reduction Agreement click on NEW SRA. **To cease Salary Reduction contributions click on the CANCEL SRA icon.**

INVESTMENT PROVIDER/PRODUCT NAME	SOURCE TYPE	AMOUNT/PERCENT
TestVendor1	Employee Deferral	$150.00

Total:$150.00

CANCEL SRA | NEW SRA | EDIT SRA


https://artdemo.ipx-sys.com/Wizard/SRA.aspx
Retirement Account
File Edit View Favorites Tools Help
ActivePresenter
(SRA)
CURRENT SRAS ON FILE
PENDING SRAS
Salary Reduction Agreement
Your Salary Reduction Agreement represents the dollar amount or percentage of pay you contribute per payroll period to your retirement account. Please Note: New or requested changes to Salary Reduction Agreements won't be effective until approved by the Plan Administrator and implemented through the payroll system.
Salary Reduction Agreements (SRAs) are established by contribution source type (pre-tax and after-tax roth) based on your Plan provisions. If you have established SRAs for both contribution source types use the drop down menu to view the details of each SRA on file.
Your current Salary Reduction by Source:
Employee Deferral
Current Salary Reduction for this Source type:
$150.00
The amount/percentage to the contribution source above is allocated to the investment provider/products listed in the table below. To change your current Salary Reduction Agreement click on the EDIT icon. To establish a new Salary Reduction Agreement click on NEW SRA. To cease Salary Reduction contributions click on the CANCEL SRA icon.
INVESTMENT PROVIDER/PRODUCT NAME
SOURCE TYPE
AMOUNT/PERCENT
TestVendor1
$150.00
Total:$150.00
Click the CANCEL SRA button
CANCEL SRA
NEW SRA
EDIT SRA
ACCOUNT SERVICES SUPPORT
FPS Group, LLC
9137 East Mineral Circle #120
Centennial, CO 80112
Customer Information
303-625-9646
TSA Consulting Group, Inc. Customer Information:
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File Edit View Favorites Tools Help

Welcome Joe Typical(B) | Log out | Test-EmployerOfficialName

Maximum Allowable Contribution | Last Login: 2/14/2017

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CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403

HELP GETTING STARTED

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Account Overview | Salary Reduction Agreement (SRA) | Funding Your Account(s) | Document Library

Salary Reduction Agreement: Confirmation of Cancel SRA(s)

You have elected to cancel the Salary Reduction Agreement(s) by contribution source type(s) listed below. Please Note: If you decide to begin contributing to your retirement account again you must complete new Salary Reduction Agreements.

Contribution Source Type: 403(b) Employee Deferi

Total Amount/Percentage: $150.00

INVESTMENT PROVIDER/PRODUCT NAME	SOURCE TYPE	AMOUNT/PERCENT
TestVendor1	Employee Deferral	$150.00

Click the CONFIRM button

CONFIRM

https://artdemo.ipx-sys.com/Home.aspx?section=balances

Retirement Account

File Edit View Favorites Tools Help

ActivePresenter

Welcome Joe Typical(B) | Log out

Test-EmployerOfficialName

Maximum Allowable Contribution | Last Login: 2/14/2017

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CHOOSE YOUR PLAN TEST-EMPLOYEROFFICIALNAME-403

HELP GETTING STARTED

OVERVIEW PROFILE INVESTING SERVICES PLANNING

That concludes the tutorial on adding, editing, and canceling an SRA. If you have questions or concerns, please contact the SRA department at 888-796-3786 option 5.

Your balances by investment provider are listed below. Investment/Annuity balances are displayed in two categories:

1) Investment Provider Xchange (IPX)™ for balances held directly in your account, and

2) Aggregated Records & Transactions (ART) for balances held with investment providers outside your account.

Click on the "+" icon to view additional data.

Account Balance (as of 01/31/17)	$0.00
Money Inflows	$0.00
Money Outflows	$0.00
Earnings (Gain/Loss)	$0.00
Account Balance (as of 02/13/17)	$0.00
+/- Change in Value	$0.00
ART INVESTMENTS	
Account Balance	$76,385.02
SUMMARY BALANCE	$76,385.02

MESSAGES & NOTIFICATIONS

You have no messages

AGGREGATED RECORD TRANSACTIONS (ART)

PROVIDER / PRODUCT NAME	BALANCE
TestVendor1	$76,385.02

ART TOTAL BALANCE: $76,385.02

DISCLAIMER