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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 Salary Reduction Agreement to be processed.

Investment Provider/Product Name	Enrollment Status	F
+ TestVendor1		
+ TestVendor2		
+ TestVendor3		
+ TestVendor4		

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

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TestVendor1

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Incomplete

I confirm I have an established account(s) with the selected Investment Provider listed above.

None







Investment Provider/Product Name	Enrollment Status	Investment Firm/Advisor
TestVendor1	Incomplete	None
I confirm I have an established account(s) with the	e selected Investment Provider listed abov	e. 🗹

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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.

INSTRUCTIONS: Assign the total dollar value to the investment provider/product(s) listed below. If you are assigning values to Total Value to Assign: \$100.00 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
TestVendor1	Incomplete	
I confirm I have an established account(s) with the	selected Investment Provid	Your Total amount must m
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Investment Provider/Product Name	Enrollment Status	Investment Firm	n/Advisor
TestVendor1	Incomplete	None	
I confirm I have an established account(s) with the se	lected Investment Provider listed above.	✓	Click t

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/- Change in Value	\$0.00				
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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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FPS Group, LLC 9137 East Mineral Circle #120 Centennial, CO 80112

Customer Information 303-625-9646

TSA Consulting Group, Inc. Customer Information: (888) 796-3786, Option 4.





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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)^{\text{TM}} for balances held directly i	n 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				
	ATC 205 02				
TestVendor1	\$76,385.02				
	ART TOTAL BALANCE: \$76,385.02				
DISCLAIMER					

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

E \$76,385.02

MESSAGES & NOTIFICATIONS

🐼 You have no messages