

LAUSD 403(b) PLAN Steps and Processes



Employee Guide

- 01** ART Online Registration
- 02** Salary Reduction Agreement (SRA) Enrollment
- 03** SRA Contribution Changes:
 - Change Amount
 - Cancel/Stop
- 04** Distribution/Transaction Requests



- 1 Go to: <https://www.tsacg.com/lausd>

Click here to register and/or access SRA Services and Transaction Processing



U.S. OMNI & TSACG Compliance Services
A DAYBRIGHT FINANCIAL COMPANY

Retirement Plan Compliance & Administration Services

Welcome to the Los Angeles Unified School District Employee Page

U.S. OMNI & TSACG Compliance Services (OMNI/TSACG) assumed the role of Administrator for the Los Angeles Unified School District's 403(b) Plan effective January 10, 2012.

OMNI/TSACG can be contacted toll-free at 1-888-796-3786.

Employer Point of Contact:
Los Angeles Unified School District
333 South Beaudry Ave.
Los Angeles, California 90017
Phone Number: (213)241-4262

Employer's Web Site: <https://www.lausd.org/benefits>

Employee Information

The below links provide specific Plan information for employees of the Los Angeles Unified School District:

- [Online Transaction Processing and Salary Reduction Agreement Processing](#)
- [Retiree Transaction Information](#)
- [403\(b\) Plan Document](#)
- [Investment Provider List](#)
- [Find Out if Your Representative is Licensed with the Financial Industry Regulatory Authority \(FINRA\)](#)
- [Find Out if Your Representative is Licensed with the California Insurance Commission](#)
- [State Retirement Systems](#)
- [Educational Video for Employees](#)
- [Contribution Guidelines](#)

This will take you to the ART (Aggregated Records & Transactions) Online System where you can begin your registration process or login for account access.

Website: <https://www.tsacg.com/lausd/art/>

NOTE:

- ART is populated by LAUSD (demographics/personal data) and by your Investment Provider (SPARK) (account information).
- Participant and associated account balance information is updated as often as data is received and processed internally.
- Participants can change their email address and security questions ONLY. Any changes in demographic (personal) information must come from LAUSD.

Home



Access comprehensive information about your retirement plan account.

LOGIN AS PARTICIPANT

USERNAME

SUPPORTED BROWSERS:
IE 9 and Above; Firefox; Google Chrome

LOG IN

Forgot your user name or password?

- I have contributed to a 403(b) account at LAUSD during the past 7 years
- I have NOT contributed to a 403(b) account at LAUSD during the past 7 years

Click here if you have never registered to use the ART System for SRAs or Transactions.

Enter your Username and Password if you are already registered to use ART.

- 1 If you are already registered on ART, continue with SRA instructions starting on page 5.
- 2 If you are registering for the first time, you must complete ALL fields with a red asterisk. The Platform Registration is as follows:

Platform Registration

Please provide the following information to set up your account.

Your Username can be up to 18 characters (letters, numbers, symbols). Your password needs to be at least 8 but no more than 16 characters, contain a number 0-9, and a special character (!#\$%&?@). Password is case-sensitive.

Username *	JTest80
Password *	
Confirm Password *	
Salutation	
First Name *	Janet
Last Name *	Test
Middle Initial	
SSN (xxxxxxxx) *	999999999

Primary Address

Primary address is required.

NOTE: The primary address is the address used when opening the account. If you would like to change your primary address, please contact customer service at .

Address *	123 Test Lane
Address 2	
City *	Los Angeles
State *	California
ZIP *	12345
Country *	United States

Mailing Address

Please enter the address where you prefer to receive your mail. (P.O. boxes are allowed.)

My mailing address is the same as my primary address

Address *	123 Test Lane
Address 2	
City *	Los Angeles
State *	California
ZIP *	12345
Country *	United States

Phone Number(s)

Enter phone number(s) without dashes, parentheses or spaces (xxxxxxxxx).

Primary Phone *	8503626840
Primary Phone Type	Home
Secondary Phone	
Secondary Phone Type	Home
Fax Number	

Email Address(es)

You can choose to have confirmation emails sent to you after a change in your profile or account. Just select "Yes" to receive emails and provide your email address.

Primary Email *	janetest@mail.com
Confirm Primary Email *	janetest@mail.com
Secondary Email	
Receive email notifications?	<input checked="" type="checkbox"/> Yes

Dates

Birth Date (mm/dd/yyyy) *	07/15/1980
---------------------------	------------

Gender

Gender *	Female
----------	--------

Marital Status

Married?	<input type="checkbox"/> Yes
----------	------------------------------

Security Questions

Question 1 *	What is the name of the street you grew up on? ▾
Answer 1 *	What is the name of the street you grew up on?
Question 2 *	What is the name of your elementary school?
Answer 2 *	What is your grandmother's first name?
	What is your oldest sibling's middle name?
	What is the name of the company of your first job?
	What is the name of a college you applied to but didn't attend?

Security Questions

Question 1 *	What is the name of the street you grew up on? ▾
Answer 1 *	First Street
Question 2 *	What is your favorite pet's name? ▾
Answer 2 *	What is your favorite pet's name?
	What is your father's middle name?
	What town were you born in?
	What was your childhood nickname?
	What was the last name of your third grade teacher?
	In what city does your nearest sibling live?

Site Key

Select one of the site key images below. You should see secure account. Site keys provide additional security to help prevent unauthorized access to

Site Key

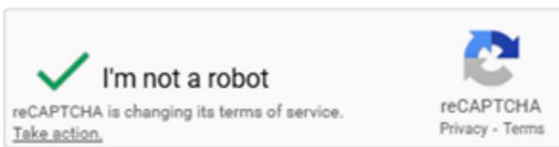
Select one of the site key images below. You should see this image each time you log into your secure account. Site keys provide additional security to help prevent unauthorized access to your account and reduce the risk of identity theft and fraud.

List of Images



Security Challenge *

To help us keep this site free from bots and your information secure, please check the box below.



Submit

3 Click "Submit."

If any field was not completed, an error message will generate indicating what is missing. If all fields were completed, the participant will be taken to a new screen and instructed further.

The registration process is complete!



- 1 To begin your Salary Reduction Agreement (SRA), click on “Services” in the blue tool bar across the top of your webpage.

When the drop-down menu appears, click “Salary Reduction Agreement”.

The screenshot shows the 'My Dashboard' interface. At the top left, there is a 'BALANCE SUMMARY' section displaying '\$38,436.00'. Below this, the 'YOUR PAYROLL CONTRIBUTIONS' section shows '\$0 (403(b) Employee) per eligible pay period.' with a yellow 'Update Contributions' button. To the right, the 'PLANNING TOOLS' section includes 'Time on Your Side' and 'How much to save?' buttons. On the far right, there is a 'Platform Service and Support' sidebar with contact information for TSA Consulting Group, Inc. and Plan Administration Support.

- 2 For a new SRA to start with the next available pay, click “New SRA.”

To choose a specific future payroll date, click “Future SRA.”

Funding Your Account

The screenshot shows the 'Funding Your Account' page. At the top, there are three tabs: 'Current SRAs On File', 'Pending SRAs', and 'Future SRAs'. Below the tabs, there is a paragraph of text explaining the SRA rules and a link for 'Start Saving Now'. A form field shows 'Your current Salary Reduction per eligible pay period is: \$0'. Below this, it states 'No Salary Reduction Agreement on record for your profile.' and 'Click on "New SRA" below to establish a Salary Reduction Agreement and Provider designation(s)'. At the bottom right, there are two buttons: 'Future SRA' and 'New SRA', with the 'New SRA' button highlighted in yellow.

3

- 1 Part 1: Your Source Type will be preselected for you.
- 2 Part 2: Select a dollar amount or a percentage amount (if applicable) and enter the amount you would like to contribute per pay period – numeric value only.
- 3 Part 3: If you chose a future SRA, enter the date you would like your SRA to take effect.
- 4 Click “Continue.”

Funding Your Account

Step 1: Contribution Instructions

1 2 3 4 5 6 7 8 9 10

PART 1
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.

Select Source Type:

PART 2
In accordance with Plan Sponsor Salary Reduction Agreement Rules, your retirement Plan may allow for different contribution method types (dollar or percentage) per eligible pay period for making salary reduction contributions. The dollar method sets a specific amount per eligible pay period. The percentage method may vary depending on how you're compensated (hourly or salaried) and allows your contribution amount to grow with increases in your pay.

Select Method Type:

Enter Total Dollars: *

PART 3
The default effective date is today's date. In accordance with Plan Sponsor Salary Reduction Agreement Rules, your Salary Reduction contributions will commence on the next eligible payroll cycle after your Salary Reduction Agreement is approved by the Plan Administrator and implemented through the payroll system.

Select Effective Date:

Cancel

Continue

4

- 1 Select your Investment Provider by clicking in the box to the right.
- 2 Click “Continue.”

Mellite	Not Required	<input type="checkbox"/>
Midland National	Not Required	<input type="checkbox"/>
North American	Not Required	<input type="checkbox"/>
Oppenheimer Funds	Not Required	<input type="checkbox"/>
Paul Revere	Not Required	<input type="checkbox"/>
PLAN MEMBER SERVICES	Not Required	<input type="checkbox"/>
ReliaStar	Not Required	<input type="checkbox"/>
Sec Benefit - IAP	Not Required	<input type="checkbox"/>
Security Benefit	Not Required	<input type="checkbox"/>
TIAA-CREF	Not Required	<input type="checkbox"/>
USAA Insurance	Not Required	<input type="checkbox"/>
USAA Investments	Not Required	<input type="checkbox"/>
VALIC	Not Required	<input type="checkbox"/>
VOYA Financial	Not Required	<input type="checkbox"/>
Western National	Not Required	<input type="checkbox"/>

Cancel

Previous

Continue

5

- 1 In the “Assign Value” box on the right-hand side of the gray box, you will need to enter the same amount as the “Total Value to Assign” box at the top of your webpage. This is the amount that you have selected to contribute per pay period.
- 2 Check the box that says, “I confirm I have an established account(s) with the selected Provider listed above.”
- 3 Click “Continue.”

Funding Your Account

Step 3: Assigning Contributions by Provider/Product(s)



Total Value to Assign: 400.00

Assign the total dollar value to the provider/product(s) listed below. If you are assigning values to more than one provider/product the amounts you assign must equal to the total contribution amount listed to the left.

All allocations must be associated with a single vendor.

Provider / Product Name	Enrollment Status	Investment Firm / Advisor	Assign Value
LegendGrp-Lincoln In		None	400.00

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

Total: 0

Cancel Previous Continue

6

You will receive a confirmation page showing that your enrollment is complete.

Funding Your Account

SRA Enrollment Completed

Please click [here](#) to print a copy of your Salary Reduction Agreement for your records.

To view or print a copy of your completed SRA for your records, click on “My Plan” and “Transaction Certificate History” and then click the envelope icon to the right of your SRA listed in the transaction history grid.

**For assistance, contact the SRA Department:
Toll free – 888-796-3786, option 5**

ART Online SRA Enrollment Instructions:

- **Change Amount**

- 1 To change the amount that you are currently contributing to your Salary Reduction Agreement (SRA), click on “Update Contributions.”

My Dashboard I want to...

BALANCE SUMMARY

\$38,436.00

YOUR PAYROLL CONTRIBUTIONS

\$300.00 (403(b) Employee) per eligible pay period.

Update Contributions

PLANNING TOOLS

- Time on Your Side
- How much to save?

Platform Service and Support

TSA Consulting Group, Inc.
(888) 796-3786, Option 4
helpdest@helpline.com

Plan Administration Support

Customer Service
208-542-9180, 127

Products and Financial Services Support

Select the product you would like support on:

- 2 Click “Edit SRA” in the bottom right hand corner of your SRA module.

Funding Your Account

Current SRAs On File Pending SRAs Future SRAs

In accordance with Plan Sponsor Salary Reduction Agreement Rules, your Salary Reduction Agreement represents the dollar amount or percentage of pay withheld from your pay check each eligible payroll period or pay period your employer deducts contributions. Your employer may choose not to take deductions from all pay periods. 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. All agreements for 457 Deferred Compensation must be approved before the first day of the month in which the deferrals are to begin.
[Start Saving Now](#)

Salary Reduction Agreement: Employee Deferral

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, update the contribution amount below the source type you wish to change.

Your current Salary Reduction by Source: Employee Deferral

Current Salary Reduction for this Source type: \$300.00

The amount/percentage to the contribution source above is allocated to the provider/products listed in the table below.

To change your current Salary Reduction Agreement click on **"Edit SRA"**.

To establish a new Salary Reduction Agreement click on **"New SRA"**.

To cease Salary Reduction contributions click on **"Cancel SRA"**.

Provider/Product Name	Source Type	Amount / Percent
Midland National	Employee Deferral	\$300.00

Total: \$300.00

Future SRA Cancel SRA New SRA **Edit SRA**

The Source Type will be preselected for you to the Plan in which you are changing your amount for. Your method type will also be preselected with the method type you are currently contributing with.

- 3
 - 1 To change your method type, select the drop-down arrow and click on your preferred method type.
 - 2 In the “Enter Total Dollars” field (or percentage, if applicable), enter the amount you want to contribute per pay period – numeric value only.
- 4 In the blue box that shows your Investment Provider Name, you will also need to update the amount in the “Assign Value” box. **The amount in the “Enter Total Dollars” (or percentage, if applicable) and the “Assign Value” box must match.**
- 5 Once you have confirmed your amount, click “Continue.”

Funding Your Account

Step 1: Edit Current SRA

The edit SRA feature allows you to change the contribution method type (\$ or %), the total amount you are contributing (\$ or %) and the amounts you assign to your current provider/products listed below.

To add additional provider/product accounts click on “Add Account”.

Instructions:
Update your method type and amount. Assign the total dollar value to the provider/product(s) listed below. If you are assigning values to more than one provider/product the dollar amounts you assign must equal to the total contribution dollar amount.

Select Source Type:	403(b) Employee
Select Method Type:	Dollars
Enter Total Dollars: *	300.00

Provider / Product Name	Assign Value
Midland National	300.00

Buttons: Cancel, Add Account, Continue

- 5 You will receive a notification that your SRA Enrollment is complete.

SRA Completed

Please click [here](#) to print a copy of your Salary Reduction Agreement for your records.

To view or print a copy of your completed SRA for your records, click on “My Plan” and “Transaction Certificate History” and then click the envelope icon to the right of your SRA listed in the transaction history grid.

**For assistance, contact the SRA Department:
Toll free – 888-796-3786, option 5**

ART Online SRA Enrollment Instructions:

- **Cancel/Stop Contributions**

- 1 To stop/cancel your contributions for your Salary Reduction Agreement, click on “Update Contributions.”

My Dashboard I want to...

BALANCE SUMMARY

\$38,436.00

YOUR PAYROLL CONTRIBUTIONS

\$300.00 (403(b) Employee) per eligible pay period

Update Contributions

PLANNING TOOLS

- Time on Your Side
- How much to save?

Platform Service and Support

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Plan Administration Support

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208-542-9180, 127

Products and Financial Services Support

Select the product you would like support on:

- 2 Click “Cancel SRA” in the bottom right hand corner of your SRA module.

Funding Your Account

Current SRAs On File Pending SRAs Future SRAs

In accordance with Plan Sponsor Salary Reduction Agreement Rules, your Salary Reduction Agreement represents the dollar amount or percentage of pay withheld from your pay check each eligible payroll period or pay period your employer deducts contributions. Your employer may choose not to take deductions from all pay periods. 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. All agreements for 457 Deferred Compensation must be approved before the first day of the month in which the deferrals are to begin.
Start Saving Now

Salary Reduction Agreement: Employee Deferral

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, update the contribution amount below the source type you wish to change.

Your current Salary Reduction by Source:

Current Salary Reduction for this Source type:

The amount/percentage to the contribution source above is allocated to the provider/products listed in the table below.

To change your current Salary Reduction Agreement click on “**Edit SRA**”.

To establish a new Salary Reduction Agreement click on “**New SRA**”.

To cease Salary Reduction contributions click on “**Cancel SRA**”.

Provider/Product Name	Source Type	Amount / Percent
Midland National	Employee Deferral	\$400.00

Total: \$400.00

Future SRA **Cancel SRA** New SRA Edit SRA

3

Click “Confirm.”

Funding Your Account

Cancel SRA

You have elected to cancel your current Salary Reduction Agreement on file by contribution source type listed below. Please click “**Confirm**” to cancel.
If you decide to begin contributing to your retirement account again, you must complete a new Salary Reduction Agreement.

Contribution Source Type:	403(b) Employee	
Total Amount /Percentage:	\$400.00	
Provider / Product Name	Source Type	Amount / Percent
Midland National	Employee Deferral	\$400.00

4

You will receive a notification that your SRA has been cancelled.

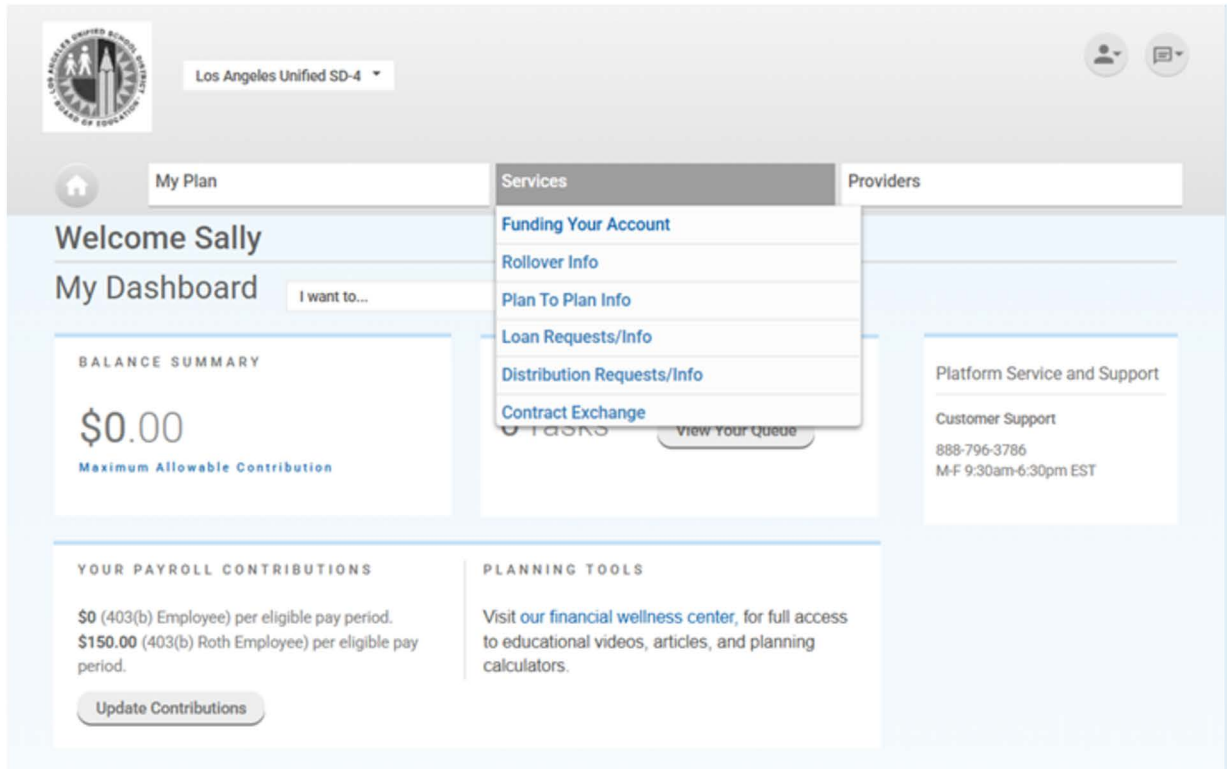
Funding Your Account

You have successfully cancelled your current SRA.
Please click [here](#) to print a copy for your records.

To view or print a copy of your completed SRA for your records, click on “My Plan” and “Transaction Certificate History” and then click the envelope icon to the right of your SRA listed in the transaction history grid.

**For assistance, contact the SRA Department:
Toll free – 888-796-3786, option 5**

- 1 To initiate a distribution and/or loan after logging in to ART, you must go to the “Services” tab.



Participant Transactions

- **Rollover**
- **Plan To Plan**
- **Loan Requests**
- **Distribution Requests**
- **Contract Exchange**

- **Rollover** – A rollover is movement of money from one qualified plan to another qualified plan with a qualifying event.

1 To submit a rollover, under Services select “Rollover Info.” If you have multiple accounts, select the appropriate account you wish to move.

IMPORTANT: "Rollover Out" will only be displayed if you have a qualifying event on file. If you do not have a qualifying event, the option will not display and be available.

2 To initiate a rollover, click “Initiate Request.”



Rollover Info

Rollovers allow participants to move assets from one retirement account into another retirement account and maintain their tax-advantaged status.

Rollover In

Choose this option if you would like to transfer assets held at another employer into your account.

Initiate Request

Rollover Out

Choose this option if you would like to transfer assets out of your account into an individual retirement account or another employer's plan.

Initiate Request



Rollover In

TIPS ?

If you would like to transfer assets held at another employer into your contract/account, select the "Rollover From Provider", input the contract/account number, and choose the "To Provider", input the contract/account number you would like your funds rolled into.

Rollover From Provider	From Contract/Account Number	Rollover To Provider Contract/Account Number	To Provider	To Contract / Account Number
AIG Retirement Services (VALIC)	<input type="text"/>	New Contract/Account	AIG Retirement Ser	<input type="text"/>

Clear

Submit

Disclaimer
NOTICE: The account balance listed above identifies the approximate amount of funding available from an individual account as last reported by your provider. This amount may not reflect recently approved or pending transactions. Please contact your provider to verify this amount.

[View Less](#)

- 1 Select “Rollover From Provider”**
- 2 Enter the “From Contract/Account Number”**
- 3 Select “To Provider”**
- 4 Enter “To Contract/Account Number”**
- 5 Click “Submit”**

- **Plan to Plan Transfer** – A plan-to-plan transfer is movement of money from a prior employer’s plan to a new employer's plan with a qualifying event.

- 1 **To submit a plan-to-plan transfer, under Services select “Plan to Plan Info.” If you have multiple accounts, select the appropriate account you wish to move.**

IMPORTANT: "Plan to Plan Transfer Out" will only be displayed if you have a qualifying event on file. If you do not have a qualifying event, the option will not display and be available.

- 2 **To initiate a plan-to-plan transfer, click “Initiate Request.”**



Plan To Plan Info

You can transfer your assets from one employer's plan to another employer's plan of the same type.

Plan-to-Plan Transfer In

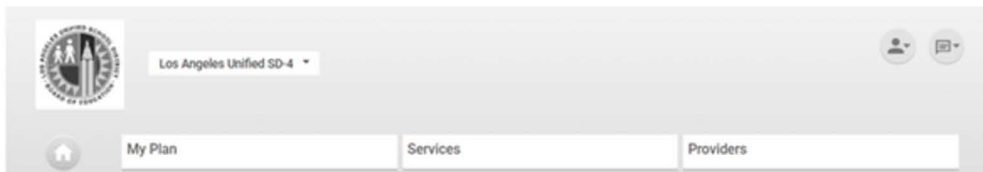
Choose this option if you want to transfer assets from another plan into your current plan.

[Initiate Request](#)

Plan-to-Plan Transfer Out

Choose this option if you want to transfer assets out of your current plan into another plan.


[Initiate Request](#)



Plan To Plan Transfer In

TIPS ?

Transfer From Provider	AIG Retirement Services (VALIC)
Contract/Account Number *	<input type="text"/>
Amount To Transfer In *	<input type="text"/> Dollars
Transfer In Provider	AIG Retirement Services (VALIC)
Clear	Submit

 **Disclaimer NOTICE:** The account balance listed above identifies the approximate amount of funding available from an individual account as last reported by your investment provider. This amount may not reflect recently approved or pending transactions. Please contact your investment provider to verify this amount. [X](#)

- 1 **Select “Transfer From Provider”**
- 2 **Enter the “Contract/Account Number”**
- 3 **Enter the “Amount to Transfer In”**
- 4 **Select “Dollars” or “Percentage”**
- 5 **Click “Submit”**

- **Loan Requests** – A loan is borrowing against the assets held in your account. Loans must be repaid (with interest). Please be advised that all loans that exceed 5-year terms will require supporting documentation to show you are using the loan for the purchase of your principal residence.

1 To submit a loan, under Services select “Loan Requests/Info.” If you have multiple accounts, select the appropriate account you borrow from.

Please Note: a personal loan may be taken for any reason and for up to 5 years. Whereas a residential loan requires proof that you are purchasing a primary residence.

2 To initiate a plan-to-plan transfer, click “Initiate Request.”

Loan Requests/Info

If your plan and provider permit loans, you may take out a loan for personal reasons or for the purchase of your primary residence.

Personal Loan
Choose this option if you would like to take out a personal loan.

Residential Loan
Choose this option if you would like to take out a residential loan.

Personal Loan TIPS ?

Maximum Loan Amount: \$2,612.51

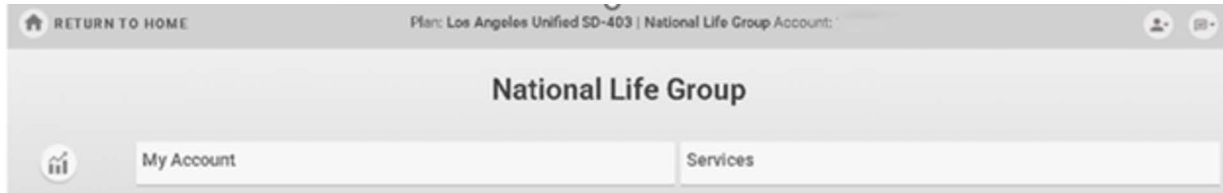
Provider / Product Name	Contract/Account Number	Current Balance	Loan Availability	Requested Amount	Balance Date
Equitable	[Contract Number]	\$470.39	\$376.31	Request	12/16/2025

[Clear](#) [Submit](#)

Disclaimer: NOTICE: The account balance listed above identifies the approximate amount of funding available from an individual account as last reported by your investment provider. This amount may not reflect recently approved or pending transactions. Please contact your investment provider to verify this amount.

- 1 Click “Request”**
- 2 Enter the “Requested Amount” you wish to borrow, but it cannot exceed the “Loan Availability”**
- 3 Click “Submit”**

- [Distribution Requests](#) – A qualifying event is required when taking a withdrawal. You must select the appropriate qualifying event based on your transaction. Please be advised that qualifying events based on age and/or employment status will only appear if you are eligible. Additionally, some qualifying events will require additional information and/or supporting documentation.



Distribution Requests/Info

Taking a distribution reduces your retirement account balance. You can learn more about eligible distributions from your account by reviewing the information below.

Hardship Distribution

Hardship withdrawals are permitted only if you have an immediate and serious financial need.

[Initiate Request](#)

Disability Distribution

You can request a distribution from your account if you become disabled.

[Initiate Request](#)

Separation from Service Distribution

You may request distributions from your account if you no longer are employed (separated from service).

[Initiate Request](#)

- [Hardship Distribution](#)
- [Disability Distribution](#)
- [Separation from Service Distribution](#)

A **Hardship Distribution** can be taken for one of the following reasons and proof of the hardship is required by the IRS in the event of an audit.

- Medical expenses (including the past 6 months) for the employee, spouse, dependents, or primary beneficiary. Expenses must not be covered by insurance. If the participant is not the recipient of medical care, documentation showing the relationship must be provided.
- Costs related to purchase of a principal residence (excluding mortgage payments). A purchase contract must be no more than 30 days old.
- Tuition and related educational fees as well as room and board expenses for the next 12 months of post-secondary education for the employee, spouse, dependents, or primary beneficiary.
- Payments necessary to prevent eviction from, or to avoid foreclosure on a principal residence. The notice cannot be more than 90 days old, and the payment must be at least 1 month behind.
- Burial or funeral expenses for employee's parent, spouse, child, dependents (as defined in IRC 152) or primary beneficiary. The expenses must be no more than 90 days old.
- Expenses for the repair of damage to a principal residence that would qualify for the casualty deduction under section 165. The contractors' estimate must be no more than 90 days old.
- Expenses and losses (including loss of income) incurred by the employee on account of a Federal Emergency Management Agency (FEMA) declared disaster, provided that their principal residence or place of employment at the time of the disaster was located in an area designated by FEMA for individual assistance with respect to the disaster.

RETURN TO HOME Plan: Los Angeles Unified SD-403 | National Life Group Account: [User Profile]

National Life Group

My Account Services

Hardship Distribution

Hardship Reason [Dropdown]

Provider / Product Name	Contract Number	Balance Date	Amount Available	Amount Requested	Clear
National Life Group		12/14/2025	\$2,142.12	Request	

Clear Submit

Disclaimer
NOTICE: The account balance listed above identifies the approximate amount of funding available from an individual account as last reported by your provider. This amount may not reflect recently approved or pending transactions. Please contact your provider to verify this amount.
View Less

Hardship Distribution

Hardship Reason [Dropdown]

Provider / Product [Dropdown]

Midland National Life

Funeral Expenses
Higher Education
Medical Care
Prevention of Eviction/Foreclosure
Purchase Principal Residence
Repair Damage to Principal Residence

- 1 Select the “Hardship Reason” from the drop-down list
- 2 Enter the “Amount Requested” you wish to withdrawal, but it cannot exceed the “Amount Available”
- 3 Click “Submit”

A **Disability Distribution** requires proof of permanent disability. Evidence of disability approval would be required.

The screenshot shows the National Life Group account interface. At the top, it says "RETURN TO HOME" and "Plan: Los Angeles Unified SD-403 | National Life Group Account". Below this is the "National Life Group" header with "My Account" and "Services" tabs. The main heading is "Disability Distribution" with a "TIPS ?" link. A table lists account details:

Provider / Product Name	Contract Number	Balance Date	Amount Available	Amount Requested
National Life Group		12/14/2025	\$2,142.12	Request

Below the table are "Clear" and "Submit" buttons. A disclaimer box contains the following text: "Disclaimer NOTICE: The account balance listed above identifies the approximate amount of funding available from an individual account as last reported by your provider. This amount may not reflect recently approved or pending transactions. Please contact your provider to verify this amount." A "View Less" link is below the disclaimer. On the right, two "Amount Requested" pop-up windows are shown. The top one has a dropdown menu with "Full" selected and "100%" next to it. The bottom one has a dropdown menu with "Partial" selected, an input field, and a dropdown menu with "Dollars" selected. Red arrows point from the "Request" link in the table to the "Full" option in the top pop-up and the "Request" link to the "Partial" option in the bottom pop-up.

- 1 Click "Request"
- 2 Select "Full" or "Partial" from the drop-down menu
- 3 If "Full" is selected, click "Submit"
- 4 If "Partial" is selected, select "Dollars" or "Percentage," enter amount, click "Submit"

A **Separation From Service Distribution** requires verification of the separation from your employer.

The screenshot shows the Midland National Life account interface. At the top, it says "RETURN TO HOME" and "Plan: Los Angeles Unified SD-403 | Midland National Life Account". Below this is the "Midland National Life" header with "My Account" and "Services" tabs. The main heading is "Separation From Service Distribution" with a "TIPS ?" link. A table lists account details:

Provider / Product Name	Contract Number	Balance Date	Amount Available	Amount Requested
Midland National Life		12/14/2025	\$8,070.39	Request

Below the table are "Clear" and "Submit" buttons. A disclaimer box contains the following text: "Disclaimer NOTICE: The account balance listed above identifies the approximate amount of funding available from an individual account as last reported by your provider. This amount may not reflect recently approved or pending transactions. Please contact your provider to verify this amount." A "View Less" link is below the disclaimer. On the right, two "Amount Requested" pop-up windows are shown. The top one has a dropdown menu with "Full" selected and "100%" next to it. The bottom one has a dropdown menu with "Partial" selected, an input field, and a dropdown menu with "Dollars" selected. Red arrows point from the "Request" link in the table to the "Full" option in the top pop-up and the "Request" link to the "Partial" option in the bottom pop-up.

- 1 Click "Request"
- 2 Select "Full" or "Partial" from the drop-down menu
- 3 If "Full" is selected, click "Submit"
- 4 If "Partial" is selected, select "Dollars" or "Percentage," enter amount, click "Submit"

- **Contract Exchange** – A contract exchange is movement of money from one investment provider to an authorized investment provider within the same employer’s plan. A qualifying event is not required to exchange your account into another authorized provider.

Midland National Life

My Account Services

Contract Exchange TIPS ?

Exchange From Provider / Product Name	Exchange From Contract Number	Approximate Current Balance	Balance Date	Amount \$ or %	Exchange To Provider / Product Name / Contract Number	Exchange To Provider	Exchange To Contract Number
Midland National Life	1	\$8,094.74	01/11/2026	Request			

Clear Submit

Disclaimer
NOTICE: The account balance listed above identifies the approximate amount of funding available from an individual account as last reported by your provider. This amount may not reflect recently approved or pending transactions. Please contact your provider to verify this amount.
[View Less](#)

Amount \$ or %

 Dollars ▾
 Dollars
 Percentage

Midland National Life

My Account Services

Contract Exchange TIPS ?

Exchange From Provider / Product Name	Exchange From Contract Number	Approximate Current Balance	Balance Date	Amount \$ or %	Exchange To Provider / Product Name / Contract Number	Exchange To Provider	Exchange To Contract Number
Midland National Life	1	\$8,094.74	01/11/2026	4500.00 Dollars ▾	New Contract ▾	AIG Retirement ▾	123456

Clear Submit

- 1 Click "Request"
- 2 Select "Dollars" or "Percentage" from the drop-down menu
- 3 Enter amount
- 4 Select "Exchange To Provider"
- 5 Enter "Exchange To Contract Number"
- 6 Click "Submit"

U.S. OMNI & TSACG Compliance Services
SRA Department
Toll free – 888-796-3786, option 5