

New User Instructions

IMPORTANT: You must already have an account with each investment provider you select, prior to starting your deduction here. You can compare investment providers, their products and fees at www.403bCompare.com.

Step 1

On the [New User Login Screen](#), scroll down and select [California 403\(b\) Plans](#) to find the Plan Password for your employer.

Please be aware, your employer will have multiple Plan Passwords, if they offer a Roth (post-tax) 403(b) plan, in addition to a traditional (pre-tax) 403(b) plan.

Plan Passwords for [457\(b\) plans](#) are listed separately, farther down the Login screen.

Step 2

Cut and Paste your Plan Password into the box on the New User Login Screen and click next. You will then be prompted to enter your Social Security Number.

Step 3

Create your User Name and Password and complete your profile.

Step 4

Click on Employee Deferral and select the dollar amount you would like deducted from your paycheck and directed to one or more investment providers. Authorize investment election changes and click Next.

Step 5

Review your profile and deductions and make any changes using the edit buttons. If everything looks OK, click Submit.

Well done! You are finished! Your six-digit confirmation number will be emailed to you.

If you have any questions, please give us a call at 800-943-9179.