#1 If you are new to the District and/or this is your first time investing in a 403(b)

Please note: If you

1.) You must first select a vendor from the approved vendor list, which is located at: www.katyisd.org/dept/hr/Pages/Voluntary-Retirement.aspx

Once you’ve made a vendor selection, you will need to contact them to request an application of account, complete it, and mail it back to the selected vendor.

2.) Now you are ready to register as a New Employee Enrollee.
   a. Go to URL www.jemtpa.com
   b. Under Services at the bottom of the page click 403(b)
   c. Click the orange Register Button.
   d. Password: katy403
   e. Next enter your social security number (no dashes)

If you receive this message after entering your social, that means you have an existing login with JEM......please skip to #3

You are about to enter enrollment into Katy ISD Voluntary 403(b). A user ID and password already exist for this SSN. Please enter your user ID and password to continue with the enrollment process.

Login

Enter user id: 
Enter password: 

Note: The password is case sensitive. If you fail to login three consecutive times your account could be disabled.

The system will then prompt you to create a unique username/password and answer a few personal questions.

3.) Now you will be guided through step by step in setting up your 403(b).
   This will include setting up:
   a. Beneficiaries
   b. Contributions
   c. Investment Elections
   d. At the end of this step by step process you will then receive a confirmation

To request a distribution, transfer, rollover, exchange, or loan, please visit www.jemtpa.com. All forms must be signed by our third party administrator (JEM).
457(b)

#2) If you are new to the District and/or this is your first time investing in a 457(b):

1.) Vendors/Investments Available In the 457(b) Plan
   Your Plan has a wide variety of mutual funds as well as portfolios that are available to review and select by logging into your account on the JEM website. The funds are held in custody by Wilmington Trust, one of the largest trust companies in the U.S. The investment advisor that oversees the investment choices and works with your employer to ensure that the funds meet the criteria of the Plan’s investment guidelines is TCG Advisors, LP, an affiliate of JEM.

2.) Now you are ready to register as a New Employee Enrollee.
   a. Go to URL www.jemtpa.com
   b. Under Services at the bottom of the page click 457(b)
   c. Next click the orange Register Button.
   d. Password: katy457
   e. Next enter your social security number (no dashes)

If you receive this message after entering your social, that means you have an existing login with JEM......please skip to #3

You are about to enter enrollment into Katy ISD Voluntary 403(b). A user ID and password already exist for this SSN. Please enter your user ID and password to continue with the enrollment process.

Login

Enter user id: 

Enter password: 

Note: The password is case sensitive. If you fail to login three consecutive times your account could be disabled.

The system will then prompt you to create a unique username/password and answer a few personal questions if one doesn’t exist already. If you have an existing 403(b) you will be prompted for your existing login information you set up while enrolling in the 403(b) plan.

3.) Now you will be guided through step by step in setting up your 403(b).
   This will include setting up:
   a. Beneficiaries
   b. Contributions
   c. Investment Elections
   d. At the end of this step by step process you will then receive a confirmation

To request a distribution, transfer, rollover, exchange, or loan, please visit www.jemtpa.com. All forms must be signed by our third party administrator (JEM).
#3) If you are currently participating in a 403(b) or 457(b) and want to make changes to your account:

1.) Scroll to the bottom of the page under Services; select either 403(b) or 457(b).
2.) Click the orange Login button.
3.) Enter your username and password. (If you have forgotten your username and/or password, click the link “Forgot user ID or password”.)
4.) Select Katy ISD 457 plan or Katy ISD Voluntary 403(b)
5.) Click the tab that states “Make Changes”, you will be then given the following options:
   a. Investment Elections: Change the amount you are contributing
   b. Transfer Funds- If you have another investment provider and would like to transfer funds
   c. Withdrawals- you will then be given a drop down menu to choose from if you’re eligible to make a withdrawal.

To request a distribution, exchange, loan, or for all other changes please visit www.jemtpa.com or contact directly at 1-800-943-9179. All forms must be signed by our third party administrator (JEM).