

VOLUNTARY RETIREMENT PLANS
403(b) and 457(b)

403(b)

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

- 1.) Visit www.jemtpa.com to view the list of approved vendors. You will click on “403(b) Vendors” and then click on “Texas Vendor List. “ **(You can only invest with an approved vendor)**

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.) You must complete a salary reduction agreement form on the website listed above. You will click on “Login to the Retirement Solution” and then “New Participant.”

Username: is your social security number (no dashes)

Password: is katy403

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

- 3.) At this point, you must click on and submit each of the following:
 - a. Change your Investment Provider
 - b. Change your Product Registration
 - c. Change your Contribution Amount

****If you are currently participating in a 403(b) and want to make changes to your account:***

- 1.) Visit www.jemtpa.com and click on “Login to the Retirement Solution” and then “Current Participant”
If this is your first time visiting the website:

Username: is your social security number (no dashes)

Password: last four digits of your social

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

- 2.) At this point, you must click on and submit each of the following:
 - a. Change your Investment Provider
 - b. Change your Product Registration
 - c. Change your Contribution Amount

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)

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

- 1.) Visit www.region10rams.org and click on:
 - a. Plan Descriptions
 - b. 457(b) Plan Descriptions
 - c. Katy ISD

This will provide you a summary of the plan.

- 2.) Now, click on “Login” then “New Participant”
Username: is your social security number (no dashes)
Password: is katy457

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

- 3.) At this point, please complete steps 1 -5 and save your enrollment elections.

****If you are currently participating in a 457(b) and want to make changes to your account:***

- 1.) Visit www.region10rams.org and click on:
“Login” then “Current Participant”
If this is your first time visiting the website
Username: is your social security number (no dashes)
Password: is the last four digits of your social

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

- 2.) At this point, please complete steps 1 -5 and save your enrollment elections.

To request a distribution, transfer, rollover, exchange, or loan, please visit www.region10rams.org. All forms must be signed by our third party administrator (JEM).

If you have any questions about the enrollment process, please email yolandanedmond@katyisd.org or contact JEM Resource Partners at 1-800-943-9179.