



PLATFORM REGISTRATION & ACCOUNT ENROLLMENT

ESTABLISHING YOUR PROFILE

STEP 1)

Go to www.tsacg.com

From the home page of TSA Consulting Group's website click on the **ART Login** link located in the center right of the page. Please note if you have already registered for online access to the ART system you may login with your current user credentials and skip to STEP 2.

STEP 2)

Register Online

Enter your Social Security Number (with NO Dashes) as the USER ID and click **LOGIN**. On the next screen you will be prompted to enter a password. Enter your birthdate MMDDYYYY (with NO slashes) as your default password and click **SUBMIT**. You will be directed to a registration page. Please follow the instructions and complete the information on the registration page.

***PLEASE REMEMBER** to write down your personalized user Name and Password.*

STEP 3)

Complete Enrollment

After completing your online registration you will be prompted to select the Plan Type 403(b) which will bring you to the GET STARTED page. The following instructions will guide you through enrolling in the Fidelity 403(b)(7) investment product.

1) Select "I'd like to learn more about my Plan's investment choices."

Getting Started

The Investment Provider Xchange (IPX)™ platform was designed to make it easy for you to manage your retirement account. Through the platform you can learn about the investment options available to you, let your employer know how much you want to save from each paycheck, and elect or change the way that you would like your savings to be invested. IPX also provides a directory of authorized agents or financial advisors for your plan and an easy way to contact them. What would you like to do?

 I'd like to learn more about my plan's available investment choices.

 I'd like assistance from an agent or financial advisor.

 I'm ready to invest now through regular salary deductions.

 I'm ready to invest now from transfer, exchange or rollover.

 I just want to review information about my account, including balances.

2) From the list of Investment Providers, select "View Profile for Fidelity Investments"

INVESTMENT PROVIDER NAME	NUMBER OF PRODUCTS	VIEW PROVIDER PROFILE
American Century Services, LLC	1	View Profile
ASpire Financial Services	1	View Profile
AXA Equitable Life Insurance Company	1	View Profile
Fidelity	1	View Profile
Fund Portal	1	View Profile
Great American-Annuity Investors Life	1	View Profile
Metropolitan Life Insurance Company	1	View Profile
Midland National Life	1	View Profile
Modern Woodmen of America	1	View Profile
National Life Group	1	View Profile
New York Life Insurance & Annuity Corp.	1	View Profile
PlanMember Services	1	View Profile
ReliaStar Life Insurance Co	1	View Profile
VALIC	1	View Profile
Vanguard Investments	1	View Profile



- 3) From the Fidelity Investment page select “View Product”

Fidelity



INVESTMENT PROVIDER PROFILE

Fidelity offers 185 mutual funds directly to participants in 403(b) plans. These funds span the investment spectrum from international equities to domestic money market funds.

View Product

PRODUCT LISTING

Fidelity 403(b) Account	View Product
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- 4) From the Product Profile page you can review product information clicking on the tabs - (PRODUCT INFO | PRODUCT FEATURES | FEES & CHARGES | INVESTMENT OPTIONS)

To open a Fidelity Investment Account online click the **ENROLL** icon

FIDELITY INVESTMENTS/FIDELITY 403(B) ACCOUNT

Product Name: Fidelity 403(b) Account
Product Type: Mutual Fund

PRODUCT INFO | PRODUCT FEATURES | FEES & CHARGES | INVESTMENT OPTIONS

PRODUCT DESCRIPTION

Fidelity offers 184 mutual funds directly to participants in 403(b) plans. These funds span the investment spectrum from international equities to domestic money market funds.



ENROLLMENT INFORMATION

This product offers the choice of how you would like to proceed with your enrollment, with or without a financial advisor/agent. Click below to begin.

ENROLL

ENROLL

- 5) Select **CONTINUE** to begin the Product Enrollment.

Product Enrollment - Step 1 Confirm Investment Advisor/Agent

Please confirm your financial advisor/agent election.

Investment Provider/Product Name	Enrollment Status	Investment Firm Advisor/Agent
Fidelity Investments/Fidelity 403(b) Account	Incomplete	Select Advisor (Optional) <input type="text"/>

CONTINUE

Cancel **Continue**

Note: If you are working with a financial advisor and wish to have them appointed to your account please contact customer service at (844) 788-3474, M - F, 9:30 am - 6:30 pm EST

6) Click **ASSIGN** to add beneficiaries

Step 2: Product Enrollment - Assign Beneficiary(ies)

1 2 3 4 5 6 7 8

You must assign at least one beneficiary to the account(s) listed below. Click the ASSIGN button to add beneficiary(ies) to listed investment provider/products. You may assign multiple beneficiaries if desired. Click the CONTINUE button to proceed to the next step.

Investment Provider/Product Name	Beneficiaries	Assign
Fidelity Investments/Fidelity 403(b) Account	Not On File	Assign

Assign beneficiary

Naming Beneficiaries: What you need to Know

Cancel Previous Continue

First Name *

Last Name *

Middle Initial

SSN (numbers only)

Address 1

Address 2

City

State

ZIP

Country

Gender

Phone

Email

Birth Date (mm/dd/yyyy) *

Relationship *

Primary

Percent *

Complete your beneficiary information in the form and click save.

Once beneficiaries are ON FILE click continue.

Step 2: Product Enrollment - Assign Beneficiary(ies)

1 2 3 4 5 6 7 8

You must assign at least one beneficiary to the account(s) listed below. Click the ASSIGN button to add beneficiary(ies) to listed investment provider/products. You may assign multiple beneficiaries if desired. Click the CONTINUE button to proceed to the next step.

Investment Provider/Product Name	Beneficiaries	Assign
Fidelity Investments/Fidelity 403(b) Account	On File	Assign

Click CONTINUE

Naming Beneficiaries: What you need to Know

Cancel Previous Continue

7) Select **CONTINUE** to make your Investment Elections.

Continue with Product Enrollment

Fidelity Investments/Fidelity 403(b) Account

INSTRUCTIONS:
The designated investment provider/product(s) are enabled with online enrollment for establishing the account(s). Clicking the CONTINUE button will take you through the additional steps for completing the account opening.

Click CONTINUE

Cancel Previous Continue

Step 6: Product Enrollment - Investment Allocation

1

Click the "Assign" button to allocate your investments.

Investment Provider/Product Name	Investment Firm/Advisor Name	Investment Elections	Current Amount	Assign
Fidelity Investments/Fidelity 403(b) Account		Not On File	0%	Assign

Click ASSIGN

Previous Continue

Comprehensive fund information including performance and expense data, along with a search feature is available for you to research investment options. Click the “ADD” icon of a fund profile you want to invest in – this will add the fund to your Investment Elections Queue.

Available Funds & Models

FUNDS | MODELS

Search by Name or Ticker Select by Investment Family Sort Display List

View: 10 | 30 | 90

Displaying 1 to 10 of 184 records (Page 1 of 19)

Investment, Performance, Fees and Expenses	10 Year	Since Inception	More Information
Total International Equity Benchmark: MSCI ACWI Ex USA NR USD Ticker: FTIEX Net Expense Ratio: 0.00 Morningstar Rating: ☆☆☆☆☆ (Unavailable) Morningstar Category: Unavailable		-0.04%	Details Prospectus Site <input type="button" value="Add"/>
Total Emerging Markets Benchmark: MSCI ACWI Ex USA NR USD Ticker: FTEMX Net Expense Ratio: 0.00 Morningstar Rating: ☆☆☆☆☆ (Unavailable) Morningstar Category: Unavailable	4.72%	5.82%	Details Prospectus Site <input type="button" value="Add"/>
Strategic Real Return Benchmark: Morningstar Mod Tgt Risk TR USD Ticker: FSRRX Net Expense Ratio: 0.00 Morningstar Rating: ☆☆☆☆☆ (Unavailable) Morningstar Category: Unavailable	-3.11%	3.26%	Details Prospectus Site <input type="button" value="Add"/>
Spartan Total Market Index Fund-Advantage Class Benchmark: S&P 500 TR USD Ticker: FSTVX Net Expense Ratio: 0.00 Morningstar Rating: ☆☆☆☆☆ (Unavailable) Morningstar Category: Unavailable	12.67%	8.70%	Details Prospectus Site <input type="button" value="Add"/>

Click to add desired investments to your Investment Elections

8) Assign percentage allocation to your selected funds and click “CONTINUE”.

Step 6: Product Enrollment - Investment Allocation

Enter your investment allocations. Please use whole numbers (i.e., no decimals or fractions) and ensure that the sum of your allocations equals 100%. When you are finished, click “Continue.”

Investment Provider/Product: Fidelity Investments/Fidelity 403(b) Account

Fund	New Elections
<input type="button" value="−"/> Total International Equity	<input type="text" value="50"/>
<input type="button" value="−"/> Total Emerging Markets	<input type="text" value="50"/>

Investment Provider/Product: Fidelity Investments/Fidelity 403(b) Account

Fund	New Elections
Total International Equity	50 %
Total Emerging Markets	50 %
Total: 100 %	

Assign allocation percentages

Confirm Allocation percentages

g) Review & Confirm ALL enrollment data

Step 7: Product Enrollment - Confirmation

1 2 3 4 5 6 7 8

Click the "Confirm" button to review and confirm the information you have provided to us.

Investment Provider/Product Name	Status	Confirm
Fidelity Investments/Fidelity 403(b) Account	Not On File	Confirm

[Previous](#) [Continue](#)

Participant: Tim McGraw

Fidelity Investments/Fidelity 403(b) Account

Allocations: Fidelity Investments/Fidelity 403(b) Account

Fund	Percentage
Total International Equity	50.00
Total Emerging Markets	50.00

[Update Allocations](#)

Beneficiaries: Fidelity Investments/Fidelity 403(b) Account

Beneficiary

Name:	m, r		
Address:			
Gender:	Birth Date:	1/1/1980	
Phone Number:	Email:		
SSN:	XXX-XX-0000	Relationship:	Spouse
Type:	Primary	Percentage:	100.00
		Source:	SYSDEF

[Update Beneficiaries](#)

[Confirm](#)

CLICK CONFIRM

10) E-Sign for your account.

OVERVIEW ▾	PROFILE ▾	INVESTING ▾	SERVICES ▾	PLANNING ▾
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Step 8: Product Enrollment - Sign Your Agreement

1 2 3 4 5 6 7 8

Click the "Sign" button to sign your agreement.

Investment Provider/Product Name	Status	Sign
Fidelity Investments/Fidelity 403(b) Account	Not On File	Sign

[Continue](#)

CLICK SIGN

Review account forms and click **"FINISH & SUBMIT ELECTRONICALLY"**.

Step 8: Product Enrollment - Sign Your Agreement

1 2 3 4 5 6 7 8

Investment Provider/Product: Fidelity Investments/Fidelity 403(b) Account

Review your IPX Agreement below. Click **"Finish & Submit Electronically"** to sign and submit your agreement. This is required to open your account. When the agreement has been signed, click **"Complete Enrollment"**.

I am applying an e-signature in my name to this document and have read the [Consumer Disclosure](#)

Finish & Submit Electronically

Retirement Account Establishment Guide

Complete Enrollment

Congratulations, your enrollment is completed!

A copy of the Enrollment Package will be stored in your Private Document Vault within your online account for reference.

If you have any questions please contact customer service at (844) 788-3474, M - F, 9:30 am - 6:30 pm EST