



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 Vanguard 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 Vanguard 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 Vanguard Investment page select “View Product”



INVESTMENT PROVIDER PROFILE

Most investment firms are publicly traded or privately owned. Vanguard is different. We are owned by the Vanguard funds, which are owned by our clients. Helping our investors achieve their goals is our sole reason for existence. With no other parties to answer to and no conflicting loyalties, we can keep investing costs as low as possible. Vanguard offers a broad lineup of Vanguard mutual funds—all with no sales commissions—including funds specifically designed for retirement investing.

PRODUCT LISTING

IPX - Vanguard	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 Vanguard Investment Account online click the **ENROLL** icon

VANGUARD INVESTMENTS/IPX - VANGUARD

Product Name: IPX - Vanguard
Product Type: Mutual Fund

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

PRODUCT DESCRIPTION

Costs matter
You can help your employees make the most of their retirement savings by offering them a diverse fund lineup with low costs.

- We manage our funds at cost. Our clients pay only what it costs us to run our funds—all with no sales commissions, 12b-1 distribution or marketing fees, or hidden transaction fees. On average, Vanguard mutual fund expense ratios are 82% less than the industry average.*
- High costs and fees cut directly into investment returns. That's why it's important to know what your employees are paying to invest through your plan. Over time, lower costs can help increase your employees' chances of reaching their retirement goals.
- We offer a broad lineup of index and actively managed funds, as well as Target Retirement Funds—which can be a one-fund investing approach.



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

Want More Information?
Account Services
9200 E Mineral Ave
Suite 225
Centennial, CO 80112
Phone: 303-625-9646
Email:



- 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
Vanguard Investments/Vanguard 403(b)(7)	Incomplete	Select Advisor (Optional)

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
Vanguard Investments/Vanguard 403(b)(7)	Not On File	Assign

Assign beneficiary

Naming Beneficiaries: What you need to Know

Cancel Previous Continue

Complete your beneficiary information in the form and click save. Once beneficiaries are ON FILE click continue.

First Name * Paula
 Last Name * Abdul
 Middle Initial
 SSN (numbers only)
 Address 1
 Address 2
 City
 State
 ZIP
 Country
 Gender [Select]
 Phone
 Email
 Birth Date (mm/dd/yyyy) * 01/01/1970
 Relationship * Spouse
 Primary
 Percent * 100

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
Vanguard Investments/Vanguard 403(b)(7)	On File	Assign

Click CONTINUE

PLANNING TIP
Naming Beneficiaries: What you need to Know

Cancel Previous Continue

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

Continue with Product Enrollment
 Vanguard Investments/Vanguard 403(b)(7)

INSTRUCTIONS:
 The designated investment provider/product(s) are enabled with online enrollment for establishing an account(s). Clicking the CONTINUE button will take you through the additional steps for completing 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
Vanguard Investments/Vanguard 403(b)(7)		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 87 records (Page 1 of 9)

Investment, Performance, Fees and Expenses	10 Year	Since Inception	More Information
Vanguard Target Retirement 2060 Fund Benchmark: Morningstar Mod Tgt Risk TR USD Ticker: VTTSX Net Expense Ratio: 0.00		13.98%	Details Prospectus Site <input type="button" value="Add"/>
Vanguard Target Retirement 2055 Fund Benchmark: Morningstar Mod Tgt Risk TR USD Ticker: VFFVX Net Expense Ratio: 0.00	9.18%	13.36%	Details Prospectus Site <input type="button" value="Add"/>
Vanguard Emerging Markets Select Stock Fund Benchmark: MSCI ACWI Ex USA NR USD Ticker: VMMSX Net Expense Ratio: 0.00	3.34%	1.35%	Details Prospectus Site <input type="button" value="Add"/>

Sort Display List: Morningstar Rating, Morningstar Category, Net Expense Ratio, 1 Year Performance, 5 Year Performance, 10 Year Performance, Since Inception Performance, Morningstar Rating, Morningstar Category: Unavailable

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 have finished, click the “Continue” button.*

Investment Provider/Product: Vanguard Investments/Vanguard 403(b)(7)

Fund	New Elections
Vanguard Target Retirement 2060 Fund	<input type="text" value="50"/>
Vanguard Emerging Markets Select Stock Fund	<input type="text" value="50"/>

Assign allocation percentages

Investment Provider/Product: Vanguard Investments/Vanguard 403(b)(7)

Fund	New Elections
Vanguard Target Retirement 2060 Fund	50 %
Vanguard Emerging Markets Select Stock Fund	50 %
Total: 100 %	

Confirm Allocation percentages

9) 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
Vanguard Investments/Vanguard 403(b)(7)	Not On File	Confirm

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

Participant: Tim McGraw

Vanguard Investments/Vanguard 403(b)(7)

Allocations: Vanguard Investments/Vanguard 403(b)(7)

Fund	Percentage
Vanguard Target Retirement 2060 Fund	50.00
Vanguard Emerging Markets Select Stock Fund	50.00

[Update Allocations](#)

Beneficiaries: Vanguard Investments/Vanguard 403(b)(7)

Beneficiary

Name: Abdul, Paula

Address:

Gender: Birth Date: 1/1/1970

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
Vanguard Investments/Vanguard 403(b)(7)	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: Vanguard Investments/Vanguard 403(b)(7)

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