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Plan Details Sachem CS, Lake Ronkonkoma NY

403(b) Plan Details:

Current Plan Status: Active

Plan Features

Eligible Employees
All Employees

Employer Non-Elective Contributions
Available

Loans
Available for qualified applicants

Financial Hardship Distribution
Available for qualified applicants

Transfers Into Plan (A transfer of assets from one employer's 403(b) plan to another)
Available

Transfers Out of Plan (A transfer of assets from one employer's 403(b) plan to another)
Available

Rollover Contributions (A contribution of a distribution from another plan (i.e. 401(k), 457, IRA))
Please call OMNI to inquire.

ROTH 403(b)
Not Available

Contract Exchanges (a change of investment within a 403(b) plan)
Available. Please note that a new investment provider must be participating in your Employer's 403(b) plan. A list of your Employer's participating providers can be found under the *Participating Service Providers* section.

Distributions (i.e. Separation from Service, Attainment of 59 ½ years of age, Permanent Disability, or Death)
Available

Participating Service Providers



Agent Info Available
Click icon next to fund name for details.

Online Enrollment Available
Click icon next to fund name for details.

- Ameriprise Financial Services, Inc.
- Aspire Financial Services
- AXA Equitable Life Insurance Company
- MetLife
- Mutual, Inc.
- NY Life Ins. & Annuity Corp.
- Oppenheimer Shareholder Svcs.
- The Legend Group/ADSERV
- Voya Financial (ING Natl NY)
- Voya Financial (ING Reliastar)

Effective July 1 2013, the following Service Providers are no longer authorized to establish new 403(b) accounts. Please note, Employees contributing to one of these service providers as of July 1, 2013 may continue their contributions without interruption.

- American Fund/Capital Guardian
- Commonwealth Annuity & Life Ins Co
- Fidelity Management Trust Co.
- Franklin Templeton Bank & Trust
- Mass Mutual VA
- MetLife of CT (Travelers)
- Prudential Defined Contribution
- Putnam Investments
- T. Rowe Price Trust Company
- Union Central Life
- Vanguard Fiduciary Trust Co.
- Voya Financial (ILIAC)

For any questions concerning your employers list of participating providers, please contact OMNI at 877-544-6664.

Forms

- Salary Reduction Agreement (SRA):**
- [Salary Reduction Agreement - Online](#)
 - [Salary Reduction Agreement - PDF](#)

Service Based Catch-Up Request:

- [Online Request Form](#)
- [Downloadable PDF Version](#)

Service Provider Transactions:

For assistance determining the proper service provider transaction form to submit for your situation, please review our [Transaction Instructions](#) page for more information

- [Death Claim](#)
- [Disability](#)
- [Distribution](#)
- [Exchange](#)
- [Hardship](#)
- [Loan](#)
- [QDRO](#)
- [Rollover](#)
- [Service Credit](#)
- [Transfer](#)

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