

Completing a Salary Reduction Agreement

Questions? Call us at 800-880-2776

The following instructions explain how to initiate, change or redirect salary reduction contributions to your voluntary retirement plan(s).

Initiating contributions to your voluntary retirement account

1. Select an investment provider. You may view a list of approved investment providers on this website under the Authorized Providers link.
2. Open an account: Contact your desired representative or investment provider to complete an investment application. Your representative or investment provider can provide you with the required application. Submit your investment application to your investment provider. Your representative can assist you in completing these forms
3. Submit a Salary Reduction Agreement: Download and complete a Salary Reduction Agreement, which is available on this website under the 403(b) Salary Reduction Agreement link. The completed salary reduction agreement should be sent to NPA. Our contact information is listed on the bottom of the form. NPA can assist you in completing the Salary Reduction Agreement.
4. Salary reductions will be made to your voluntary retirement plan starting the month designated on your salary reduction agreement if submitted and processed before your employer's cutoff date.

Increasing or decreasing contributions to your voluntary retirement account

1. Complete a salary reduction agreement with the new amount you would like contributed to your voluntary retirement plan. The salary reduction agreement is available on this website under the 403(b) Salary Reduction Agreement link.
2. Submit the salary reduction agreement to National Plan Administrators. Our contact information is listed on the bottom of the form.
3. Salary reductions will be made to your voluntary retirement plan starting the payroll date designated on your salary reduction agreement if submitted and processed before your employer's cutoff date.



Redirecting contributions to a different approved investment provider or product

1. Select an investment provider. You may view a list of approved investment providers on this website under the Authorized Providers link.
2. Open an account: Contact your desired representative or investment provider to complete an investment application. Your representative or investment provider can provide you with the required application. Submit your investment application to your investment provider. Your representative can assist you in completing these forms
3. Submit a Salary Reduction Agreement: Download and complete a Salary Reduction Agreement, which is available on this website under the 403(b) Salary Reduction Agreement link. Be sure to terminate the prior Salary Reduction Agreement by completing the termination section on the new salary reduction agreement. The completed salary reduction agreement should be sent to NPA. Our contact information is listed on the bottom of the form. NPA can assist you in completing the Salary Reduction Agreement.
4. Salary reductions will be made to your voluntary retirement plan starting the month designated on your salary reduction agreement if submitted and processed before your employer's cutoff date.

Locating the TRS Certification ID Number as required for Plan Sponsors in Texas

1. To locate the TRS Certification ID Number, please open a web browser on a computer with Internet access and navigate to the Teacher Retirement System of Texas web site, www.trs.state.tx.us. On the left hand side of the web page under Quick Links, select and click on a link titled, "403(b) Certification & Product Registration."
2. You should now be on the web page titled, "403(b) Certification." Below that heading, locate a sub-heading title, "403(b) Registered Products." Directly underneath this sub-heading, you should click on a link titled, "403(b) Product List."

<https://oapi.trs.state.tx.us/FOTB/do/memberWebListSearchSetup>
3. This should bring up a search web page. This web page will allow you to run a search by company name, product name, and product type.



4. Click on the “View Active Product List” link. The resulting web page may take a few minutes to load.

<https://oapi.trs.state.tx.us/FOTB/do/memberWebListFull>

5. Search for your product company and product name. The TRS Certification ID Number will be found in the column labeled “I.D. Number.” Copy this identification number on to your salary reduction agreement.

