

OMNI's SRA Administration Takes the burden off of you!

OMNI prides itself on providing full service Salary Reduction Agreement (SRA) administration that includes direct submission of SRAs to OMNI, thereby alleviating you of this responsibility.

The fastest and most efficient way for your employees to complete the form is electronically on our secure website.

How is it done?

Step 1

Employees begin by selecting the "Participants" button at www.omni403b.com



Step 2

The employee must select the state in which they work and type the employer name (selection should autofill after entering several characters). Once the selection is made, click "Show Details".



Step 3

Step 4

This will bring up your customized page where employees can view all approved service providers along with form links to request online transactions. The SRA form can be found at the top right of this page (click on Salary Reduction Agreement- Online). If an employee prefers, he/she can print out a pdf version to mail or fax to OMNI.



Here the employee can follow instructions to quickly submit their SRA form. If assistance is needed, OMNI's call center is available Monday – Friday from 7:30 A.M. – 8:00 P.M. EST and staffed with bi-lingual representatives equipped to handle all participant questions and concerns.

EMPLOYEE SPOTLIGHT

Meet our QA and Training Specialist, Jennifer Spoth

How many years have you been with OMNI?

September 2016 will mark my 9th year with OMNI.

What are your main job functions?

Quality assurance for the SRA process, training of new call center representatives, support for the OMNI call center, and a variety of other recordkeeping data maintenance functions.

What is your favorite part about your job?

Working for a close-knit, family friendly company. OMNI maintains a great atmosphere, while continually expanding and providing services to clients across the country.



What was your proudest moment at OMNI?

My background and training is as an educator; I get a great deal of satisfaction from training OMNI's call center representatives and watching them excel.

What do you enjoy outside of work?

Volunteering, running, and music.

What is something every employer should know about OMNI's services?

OMNI truly is dedicated to providing excellent service to their employees; our representatives go above and beyond every day.

What are your retirement dreams?

Attending jazz festivals across the US and Canada and Kayaking in Costa Rica.

Testimonial

"Jennifer has been very helpful in stressful situations. Her customer service skills are stellar. Jennifer never hesitates to go out of her way to help, no matter how often I've contacted her with requests. She works tirelessly to see a problem through and I give her credit for this wonderful trait."

As an independent TPA, you can rest assured that OMNI's sole concern is the integrity of your plan!

At OMNI we pride ourselves in being an **INDEPENDENT** third party administrator (TPA). What do we mean by **independent** and why is that important? Being **independent** means that OMNI remains free of any potential conflicts of interests, does not offer or recommend any specific investment products, and will not refer you to a specific fund company. Fund selection is up to the plan sponsor. OMNI does not benefit from the dollar amounts contributed by participants. Our only focus is providing the best possible administrative services to you and your employees.

Byron-Bergen CSD Dedicated Specialists



Tracy Kleisley
Compliance Specialist
Ext 168



Ashlee Bruton
Remittance Specialist
Ext 122

OMNI Opens New Office in California

OMNI is pleased to announce the opening of its west coast operations office in Concord, California. The office will serve the many new clients coming to OMNI through extensive growth as well as long-time clients in California and surrounding states. OMNI's President and CEO, Robert McLean said, "Having operations personnel in both west coast and east coast time zones will provide optimal customer service to plan sponsors and their employees that accommodates their schedule." OMNI plans to expand its California operations as its clientele in western states continues to grow.

OMNI to attend the following Fall/Winter conferences in 2016:

- MO ASBO - Oct. 16-18
- NJSBA - Oct. 25-27
- SC ASBO - Nov. 1-3
- NY ASBO - Nov. 1-4
- GA ASBO - Nov. 8-11
- OSBA - Nov. 14-15
- KY ASBO - Nov. 16-18

**Stop by our
BOOTH!**



www.omni403b.com