

Enrollment Instructions

Envoy Financial, Support Coordinators

**Grace To Go
Case Number: 665-80012**

1. **A. Telephone enrollments into the 403(b) plan at the initial group enrollment:** Telephone Enrollment Appointment Sign Up Sheets have been provided for your organization. Please indicate, on that sheet, a convenient date and time for a member of our LifeStage Team to call you. Please provide a telephone number and extension where you can be reached.

B. Telephone enrollments into the 403(b) plan after the initial group enrollment: Please call Envoy Financial at (888) 879-1376, extension 1, to schedule your telephone enrollment appointment with a LifeStage Specialist.
2. **Have available the following information when you enroll (telephone or online):**
 - a. A pay stub
 - b. Current Investment Statements (403(b), 401(k), IRA, and other accounts, etc.)

The telephone call generally lasts twenty to thirty minutes and represents the “starting point” for enrollment into the Grace To Go 403(b) plan. Your LifeStage Specialist will explain the 403(b) plan, answer any questions you might have, and provide investment suggestions specific to your risk tolerance and retirement plan objectives. (This counsel is provided by Envoy Financial LifeStage Specialists acting in their capacity as Registered Representatives of Lincoln Investment Planning, Inc., Registered Investment Advisor, Broker Dealer, Member FINRA/SIPC.)

3. After your telephone or online enrollment, all required paperwork will be prepared and emailed to you (password protected).
4. Upon receipt, please print, review, sign, and return the paperwork to Envoy Financial within three business days by email, fax, or USPS. Our contact information will be included should you have additional questions.
5. Once Envoy Financial has received your signed 403(b) paperwork, we will facilitate the establishment of your account with Nationwide. At the same time, Envoy Financial will forward the Salary Reduction Agreement (enrollment paperwork document authorizing your contribution amounts) to the Grace To Go payroll department to start the contributions. This typically takes about two weeks to implement.
6. Your 403(b) enrollment is complete. Access to account information on-line usually takes about two to three weeks after paperwork is completed. Information on how to go online will be emailed to you. Congratulations!