



WEA Trust Member Benefits 403(b) Plan Administrative Assistance

	WEA TSA Trust
Value-Added Administrative Services from WEA Trust Member Benefits	
Compliance support	yes
Updates on regulatory changes	yes
Sample plan document services:	
Written plan document - updates as needed	yes
Adoption Agreement	yes
Service Provider Agreement/Hold Harmless	yes
Board resolution	yes
Salary Reduction Agreement	yes
Information Sharing Agreement	yes
Sample Notices:	
Universal availability notices	yes
Employee notices	yes
Vendor notices	yes
Employer Plan Level Reporting (if needed for plan review or IRS audit)	yes
Education-Employee educational meetings	yes
WEA TSA Trust Contributions - Administer according to your plan	
Contribution Limit Calculations (when needed)	yes
Monitor excess contributions (ongoing)	yes
Notify employee/employer of excess	yes
Remittances:	
Manual	yes
Electronic processing	yes
Nonelective: Separate sourcing and vesting (future)	yes
Elective: Separate sourcing (pre-tax 403(b) and Roth 403(b))	yes
WEA TSA Trust Distributions - Administer according to your plan	
Monitor qualifying events	yes
QDRO - administer per directions	yes
Required Minimum Distributions - age 70½	
Notify employee - distribute as per participant instructions	yes
Post employment	yes
Hardship - administer per 401(k) safe harbor rules and school districts plan rules	yes
Coordinate maximum with other vendors/notify districts of 6 month contribution suspension	yes*
Loans (not available in WEA TSA Trust programs)	n/a
Exchanges, transfers, rollovers - process per plan documents and new regulations	yes
Death - liberal beneficiary payout/distributions	yes
Other Services - As needed	yes

*Yes, if other vendor information provided.

This document is provided by the WEA Tax Sheltered Annuity Trust program to assist you with the administration of your 403(b) program. This document is not intended to constitute legal or tax advice. Please contact your legal or tax professional for more detailed information.

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1-800-279-4030 weabenefits.com

03-19-09