

QuickENROLL Step-by-Step Instructions

As you are aware, Pinellas County Schools recently implemented the QuickENROLL process for easy and quick 403(b) enrollment. In order to show just how rapid this process is, below are the basic steps outlined for you:

Visit the website <u>www.myquickenroll.com</u>, select your employer from the drop down menu, and click on the "Continue" button:

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FIRST STEP TOWARD A		
BRIGHT FINANCIAL FU	TURE	
SELECT EMPLOYER		
Choose Employer Continue	•	

Select the participating authorized Investment Provider company of your choice:

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Review the information provided by your selected Investment Provider, and click the "Enroll Now" button at the bottom of the page to continue the enrollment process.

On the "Simplified Enroll" screen, simply input the basic information requested for opening an account, high the "Submit" button. If your information is available within the demographic data supplied by your employer, the next screen will allow you to review and confirm or update any necessary personal information required to open your account. If your information is not available, simply input the necessary information requested that is needed to establish your account. Click the "Confirm" button once finished.



The "Simplified Enrollment" page allows you to designate the amount you wish to voluntarily contribute to your selected account. Enter the total amount you wish to contribute in the "Total Per Pay Dollar Amount" in the top box on the page. Once entered, move to the "New Contributions" section, enter the amount you wish to contribute each payroll, enter any agent information you may have, and click the "Submit" button. If you are enrolling in a new account, a pop-up box may appear asking you to confirm that the account will indeed be new.

Simplified Enrollment X	· · · · · · · · · · · · · · · · · · ·	P • ि ☆ © ©
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	Orange County Public Schools	^
	Jane i Sampie	
	Salary Reduction Agreement Information	
	Effective Date 09/22/2017	
	Dollars Total Par Pay Dollar Amount S 25.00	
	New Contributions	
	Investment Provider Plan Type Amount New	Account
	The Variable Annuity Life Insurance Company V 403(b) V \$ 0.00	×
	SRA Total \$ 0.00	
	* Must Equal Total Per Pay Amount	
	Agent Information	
	Agent ID	
	Agent Name	
	Agent Phone	~
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The final page allows you to review all the information you entered to ensure everything is correct. Depending on the Investment Provider company you selected, there may be additional boxes of information that need to be acknowledged; therefore, please review this page carefully. An electronic signature may be required to complete the enrollment process. Please pay close attention and review all information displayed on this page. Once done, click "Submit."

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	Ora	ange County Public Schools		
	F	Participant Information		
	First Name	Jane		
	Middle Name	Т		
	 Last Name 	Sample	1	
	* SSN	xxx-xxx-3333		
	Citizenship	U.S. citizen	~	
	 Birth Date 	01311989		
	 Hire Date 	09142000		
	 Street Address 	1234 Sample Rd		
	City	Sample		
	 State 	FL		
	 Zip Code 	55555		
	* Phone	8505555555		
	• Email	test@sample.com		
	Full Time	×		
	Annual Salary			
	Annual Pay Penods		-	



Congratulations! You are now enrolled and on your way to saving for a successful retirement. You can click the "continue" button at the bottom of the Confirmation page to access your completed SRA form for your records. Click the "Download 403(b) Confirmation and SRA" link as shown in the above graphic example to download a PDF copy of your completed SRA for your records.

