



Enrollment and online account access

Start your Jackson Health System - 403(b)

AIG Retirement Services



Enrollment and online account access

It's easier than ever to get started and on the path to becoming FutureFIT[®] with AIG Retirement Services.

We've simplified the process of entering contributions, fund selection, getting professional help, navigating the process and registering for online access. And we made the whole experience more personalized for you.

Here are a few things you need to get started:

- Your group's access number **09058001**
- Your personal information including Social Security number
- Your beneficiary information

There are plenty of opportunities during enrollment to customize where to direct investments, get professional investment advice, set contact preferences and more. And it's easy to navigate back to previous pages to make changes.

Step 1: AIG Retirement Services Home Page

The screenshot shows the AIG Retirement Services Home Page. At the top, there is a navigation bar with the AIG logo, the text 'AIG Retirement Services', and links for 'ABOUT US', 'FINANCIAL EDUCATION', 'NEWS', and 'CONTACT US'. To the right of these links are a 'SIGN IN' button and a search icon. The main content area features a large blue banner with a photo of a smiling couple. On the left side of the banner, the text reads 'Plan for 100SM' and 'Think big. Plan bigger.' Below this text is a 'PLAY VIDEO' button. On the right side of the banner, there is a 'WELCOME' section with input fields for 'USERNAME' and 'PASSWORD', a 'SIGN IN' button, and links for 'SPONSORFIT[®] ACCESS' and 'FORGOT USERNAME OR PASSWORD'. At the bottom of the page, there are two options: 'Enroll and start saving in your employer's plan' with an 'ENROLL' button, and 'Already enrolled? Register to access your account online' with a 'REGISTER' button. An orange arrow points to the 'ENROLL' button.

- 1 The first step is the home page, aig.com/RetirementServices. Click 'ENROLL'.

Enrollment and online account access

Step 2: Access Code

Let's start with your plan.

Enrollment doesn't take long at all. Just give us a few details and we'll get started.

ACCESS CODE

09058001

FIND PLAN

Attention: Your privacy is important to us. Want to know more about our privacy policy?
It's [right here](#).

You will need the access code (designated for your group and plan).

Step 3: Plan Confirmation

Let's start with your plan.

Enrollment doesn't take long at all. Just give us a few details and we'll get started.

All fields are required

ACCESS CODE

09058001

SOCIAL SECURITY NUMBER

____-____-____ HIDE

FIRST NAME

LAST NAME

DATE OF BIRTH

FIND PLAN

Enter the details and we can confirm your plan.

Enrollment and online account access

Step 4: Personal Information and Registration

Next, enter the required personal information (marital status, address, hire date ,etc.).

The screenshot shows the 'About You' registration page for AIG Retirement Services. The page includes a header with the AIG logo and 'AIG Retirement Services' text, and a contact number 'HELP 1-800-544-7022 100 & Hours'. The main heading is 'About You' with the subtext 'Let's get acquainted — we'll start with the basics.' and a note '*Indicates required'. The form fields are arranged in two columns:

- PREFFS:** A dropdown menu with 'SELECT' as the current selection.
- FIRST NAME*:** A text input field containing 'Paula'.
- MIDDLE NAME:** An empty text input field.
- LAST NAME*:** A text input field containing 'Eg'.
- SUFFIX:** A dropdown menu with 'SELECT' as the current selection.
- DATE OF BIRTH*:** A text input field containing '08/18/1988'.
- MARITAL STATUS*:** A dropdown menu with 'SELECT' as the current selection.
- SEX*:** Radio buttons for 'M', 'F', and 'Prefer not to answer'.
- PHONE NUMBER*:** An empty text input field.
- SOCIAL SECURITY NUMBER:** A text input field containing '###-##-7719'.

Below these fields is a note: 'For non-U.S. addresses, please call 1-800-448-2222'. A larger note states: 'Your residential address determines a P.O. Box. You get either a P.O. Box as a separate mailing address after entering your residential address.' The address section includes:

- RESIDENTIAL ADDRESS LINE 1*:** An empty text input field.
- ADDRESS LINE 2:** An empty text input field.
- ADDRESS LINE 3:** An empty text input field.
- CITY*:** An empty text input field.
- STATE*:** A dropdown menu with 'SELECT' as the current selection.
- ZIP CODE*:** An empty text input field.

There is a question: 'Is this also your mailing address? (Select Yes to add one.)' with radio buttons for 'Yes' (selected) and 'No'. The **EMPLOYER NAME** field contains 'HOY CROSS HOSPITAL, A DIVISION OF TADIS HEALTH SYSTEMS, INC.'. The **HIRE DATE*** field is empty. The **ANNUAL INCOME*** field contains '0 0'. A question asks: 'Are you employed by or holding a license with a Financial Industry Regulatory Authority (FINRA) member firm?' with radio buttons for 'Yes' and 'No' (selected). The **EMAIL*** field is empty. At the bottom, there is a 'Save to Go On' button with a checkmark icon, a 'BACK' button, and a 'CONTINUE' button. A footer note reads: 'Start to delivery for electronic documents instead of paper-based. Documents may include account statements, program and regulatory reports, disclosures, transaction confirmations, etc.'

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Step 5: Selecting contributions

CONTRIBUTION PORTFOLIO BENEFICIARIES REVIEW

Contribution

Set your contribution, and get set for the future. + MORE

PRE-TAX CONTRIBUTION PER PAY PERIOD
Your current contribution type is %

CURRENT CONTRIBUTION ⓘ

CONTRIBUTE BY

% PERCENT DOLLARS

10%

\$ 384.62 /pay period

Enter a per pay period amount in order to adjust the fractional percentage rate

ANNUAL SALARY
\$100,000

You might only see a \$307.70 reduction with each paycheck.
Not a bad pre-tax savings, we'd say.

SEE HOW IT WORKS

This contribution will process on the next available payroll date or as soon as administratively possible thereafter.

By clicking Continue, your contribution will be 10%

SAVE & EXIT BACK CONTINUE

The progress bar shows where you are in the enrollment process.

Click on the different sections to navigate back and forth.

Next, elect your deferral amount if the group allows online contributions.

Entering a salary will show how contributions affect paychecks.

Select 'Continue' when finished.

Enrollment and online account access

Step 6: Model Portfolios

If you select 'Pick a portfolio', you will be able to select a model portfolio in your plan.

Select 'Continue' when finished.

Enrollment and online account access

Step 7: Portfolio Detail

CONTRIBUTION PORTFOLIO BENEFICIARIES REVIEW

Portfolio Allocation

Okay, now you can decide how to invest those contributions. Choosing investment options is important, and so is researching them.

Your plan name is Holy Cross Hospital Retirement Savings Plan
Allocation percentages below apply to the following contribution source(s):
Employee Elective Pre-Tax

Investment Vehicle	Allocation Percentage
<input type="radio"/> FIXED INCOME	100%
<input checked="" type="checkbox"/> FIXED INTEREST OPTION <small>Assets invested in 'VALIC FIXED INTEREST' fund may be subject to restricted transfer availability. There may be other investment options considered to be Competing Options that will be excluded in direct transfers from 'VALIC FIXED INTEREST'. Amounts transferred from 'VALIC FIXED INTEREST' to non-excluded investment options will be restricted from transfer to Competing Options for 90 days. For questions please contact an Enrollment Specialist. We are available Monday through Friday, from 7:30 a.m. to 7:00 p.m. (Central Time) at 1-888-569-7055 or (1-800-248-2542) TDD, Hearing or Speech Impaired).</small>	50%
<input checked="" type="checkbox"/> JANUS HENDERSON FLEXIBLE BD S	50%
<input type="radio"/> INTERNATIONAL	0%

VIEW FUND PROSPECTUS

To view fund prospectuses, select the "View Fund Prospectus" link (it opens in a new tab); then select your plan from the drop-down menu. Click "Funds" on the right-hand navigation, then click "View" for the prospectus you want.



← When you elect to customize your own funds, you will be navigated to the Portfolio Allocation page. Note that the allocations must equal 100%.

When you elect to customize your own funds, you will be navigated to the Portfolio Allocation page. Note that the allocations must equal 100%.

← Select 'Continue' when finished.

Select 'Continue' when finished.

Step 8: Beneficiary Details

AIG AIG Retirement Services HELP: 1-888-569-7055
TDD & Hours

CONTRIBUTION PORTFOLIO **BENEFICIARIES** REVIEW

Primary Beneficiaries

You can only make changes to this plan through your employer. Contact them directly to designate your beneficiaries.

SAVE & EXIT BACK CONTINUE

BENEFICIARY		ADDRESS	
NEW			
PERCENTAGE*	BENEFICIARY TYPE*	CITY	
%	SELECT		
FIRST NAME*	LAST NAME*	STATE	ZIP
		SELECT	
BIRTHDATE	SSN	HIDE	EMAIL
<input type="checkbox"/> Use your address			PHONE

DELETE CARD

+ ADD ANOTHER PRIMARY BENEFICIARY

Total: 0%

The total percentage should be 100%.

SAVE & EXIT BACK CONTINUE

You will then designate your Primary Beneficiaries (and contingent beneficiaries if you choose). Some plans have spousal restrictions (e.g., 50% and 100%) regarding beneficiaries. In such plans, the employee will be required to allocate to their spouse at the required rate.

To list more than one primary beneficiary, click this link.

Click 'Continue' when finished.

Step 9: Terms of Use

AIG AIG Retirement Services HELP: 1-800-549-7055
TDD & Hours

CONTRIBUTION — PORTFOLIO — BENEFICIARIES — REVIEW

Please review our Terms of Use

LEGAL NOTICE

The following Terms and Conditions govern use of VALIC's website to access VALIC account(s) online ("VALIC," "I" or "You" refers to The Variable Annuity Life Insurance Company and its affiliates ("VALIC"), You or Your/ mine as Authorized User of VALIC Online, Employer means Your employer that sponsors the retirement plan(s) in which you are enrolling using VALIC Online.

Only VALIC plans or their authorized representatives (Authorized Users) may register and/or use VALIC's website to access a VALIC account online. Each online access allows You to view Your account details and may enable You to request certain financial and non-financial information online. A VALIC plan includes (i) a plan participant or each participant's beneficiary or alternate payee in an Employer sponsored retirement plan for which VALIC is a service provider or (ii) an individual who owns or controls an individual retirement account or non-qualified annuity issued by VALIC. Unauthorized individuals attempting to access a secure website of VALIC online may be subject to prosecution.

By clicking the I Agree button below You:

- represent and warrant that You are an Authorized User; have access to a computer with an internet connection that meets the following minimum hardware/software requirements:
 - a. Operating System: Windows 7, OS X 10.8, iOS 9.0, or any later E.O.
 - b. Browser: Application: Internet Explorer 10, Mozilla Firefox, Safari 8.1.2 (only supported on Mac OS and iOS), Chrome 33.0.0.7453
 - c. Hardwre Address: T.T.O.
- and can receive emails at the email address You provided to VALIC as part of the online registration;
- accept the Terms of Use available at www.aig.com/termsandconditions;
- acknowledge receipt of the Privacy statement available at www.aig.com/privacy and Security Center information available at www.aig.com/securitycenter;
- agree to only use the site in compliance with applicable laws;
- understand that the information contained on VALIC's website is for investment advice, an offer, or a solicitation for the purchase or sale of any securities or insurance product. Any information is intended to be an offer for the purchase and sale of securities. You should consult the appropriate prospectus and other registration materials filed with the Securities and Exchange Commission (SEC). If You desire to purchase a security of any kind we recommend that You consult a qualified stockbroker or financial adviser.
- further understand that Your screen is effective only You click below, and will remain in effect and You will remain Your screen. You may cancel online access to Your account held on VALIC by calling the VALIC Client Care Center at 1-800-549-7055 and
- acknowledge the continuing use of VALIC's website to access Your account(s) constitutes Your acceptance of any revisions to the terms herein.

If You need to update Your email address with VALIC in the future, You may do so by accessing Your online account via www.VALIC.com or by calling the VALIC Client Care Center at 1-800-549-7055.

By using VALIC Online to enroll in an Employer sponsored plan, You agree to these additional terms:

- You are an eligible/eligible participant in an Employer sponsored retirement plan for which VALIC is a service provider;
- By completing and submitting Your enrollment information online, You authorize VALIC to establish a participant account(s) in your name under your Employer's Plan. You understand that, IF REQUIRED BY YOUR EMPLOYER PLAN, YOU MUST COMPLETE AND SIGN A SALARY REDUCTION AGREEMENT/DEFERRED COMPENSATION AGREEMENT, AS APPLICABLE TO YOUR EMPLOYER IN ORDER TO BEGIN VOLUNTARY ENROLLING CONTRIBUTIONS TO YOUR PARTICIPANT ACCOUNT.
- You agree that Your electronic signature will be obtainable as an original signed document if any such law and that You will not challenge or dispute the authenticity of such records on the grounds that an electronic signature is not legally binding.
- You represent that You are able to read the website and messages, and can print a copy of the enrollment confirmation page for future use.
- By providing your contact information you consent to receive phone calls/texts that may be generated using automated technology and/or artificial or pre-recorded voices from AIG to confirm my identity at the phone number(s) provided, including a wireless number if provided. Your message carrier's messaging and data rates may apply.

VALIC will provide access to Your Enrollment information at the end of the electronic enrollment process. We recommend that You print a copy for Your records. We will send a written confirmation when Your participant account(s) in the retirement plan has been established. You may also request a written copy of Your enrollment information by calling the VALIC Client Care Center at 1-800-549-7055 (for hearing and speech impaired access, dial 1-800-549-7055 (TDD)). Customer Service Representatives are available Monday through Friday, from 7:00 a.m. to 8:00 p.m. (ET).

I have CAREFULLY read this Consent and accept it voluntarily and with full knowledge and understanding of its terms and conditions.

I acknowledge that I have received and/or read the prospectus(es) of the investment option(s) selected and their prospectus(es), disclosure documents and fund fact sheets have been made available to me on this website. I acknowledge that it is my responsibility to read the prospectus(es) of any investment option selected and agree to the terms therein. I understand that the value of amounts allocated to the investment options will vary depending upon the performance of the investment option selected, which may result in either a gain or loss.

I acknowledge that no representative of VALIC nor any VALIC affiliate, including VALIC Financial Advisors, has provided me with advice, recommendations or suggestions as to any specific investment options.

I understand and consent to the Salary Reduction Agreement.


I understand I need to complete a separate form to designate beneficiaries.

To continue, accept the terms of use.

Click 'Continue' when finished.

SAVE & EXIT BACK **CONTINUE**


Step 10: Review

HELP: 1-888-569-7055
TDD & Hours

CONTRIBUTION PORTFOLIO BENEFICIARIES REVIEW

Review

Please review your information and make any necessary changes.



Plan Information

EMPLOYER NAME : HOLY CROSS HOSPITAL, A DIVISION OF
TAOS HEALTH SYSTEMS, INC.
PLAN NAME : Holy Cross Hospital Retirement Savings Plan
HIKE DATE : 06/30/2010
ANNUAL SALARY : \$100,000

About You

[EDIT](#)

NAME : Pruthi RAJ
SSN : ***-**-2920
RESIDENTIAL ADDRESS : 2929 Allen Parkway,
Houston, TX 77019
Mailing address is the same.
BUSINESS PHONE : (713) 289-4199
BUSINESS EMAIL : pruthi.raj@valic.com
PREFERRED CONTACT : Email
DELIVERY OPTION : Email: pruthi.raj@valic.com
FINRA : No
FINRA EMPLOYER : N/A

Contribution

[EDIT](#)

PRE-TAX CONTRIBUTION : 10% /pay period

Investment Option - Choose Your Own

[EDIT](#)

[EMPLOYEE ELECTIVE PRE-TAX]

FUNDS	ALLOCATION PERCENTAGE
FIXED INCOME (100%)	
FIXED INTEREST OPTION	50%
JANUS HENDERSON FLEXIBLE BD S	50%

SAVE & EXIT

COMPLETE ENROLLMENT

Once Terms of Use are accepted, you will be able to review and edit the information you entered.

Clicking 'Complete Enrollment' wraps things up and automatically generates a confirmation email.

Enrollment and online account access

Step 11: You're Enrolled!

AIG AIG Retirement Services HELP: 1-888-569-7055
TDD & Hours

Your enrollment has been saved!

Create a username and password to finalize your online account access.

[CREATE ONLINE ACCESS](#)

EMPLOYER NAME: HOLY CROSS HOSPITAL, A DIVISION OF TAOS HEALTH SYSTEMS, INC.
PLAN NAME: HOLY CROSS HOSPITAL RETIREMENT SAVINGS PLAN
PRUTHVI RAJ

PRE TAX CONTRIBUTION
10%

EMPLOYEE ELECTIVE PRE-TAX
FIXED INTEREST OPTION
50%
JANUS HENDERSON FLEXIBLE RD. S
50%

DELIVERY OPTION: Email DELIVERY ADDRESS: pruthvi.raj@valic.com

CONFIRMATION ID: 70415001-201906111160633N1260167W
DATE SUBMITTED: 06/11/2019

Some things for your to-do list

Need a trusted contact? Please complete the [Trusted Contact Form](#).

Enrollment and online account access

Step 12: Username & Password

Username & Password

 SHOW

Very Strong

 SHOW

Need help?
[View our registration guide](#) or [FAQ](#)
1-800-448-2542
TDD & Hours

You will then be prompted to input the needed information to create your online account. Once the information is entered, please select 'Continue'.

Enrollment and online account access

Step 13: Email Verification

Validate Your Email

We've emailed a code to
p*****j@aig.com

Enter Validation Code
•••••• [SHOW](#)

CONTINUE

Can't find it in your inbox or junk folder? [Resend Code](#)

Your code could be delayed due to your email settings. Please wait up to 5 minutes before requesting a new code.

Need help?
[View our registration guide or FAQ](#)
📞 1-800-448-2542
TDD & Hours 😊

You will then be prompted to verify your email to create your online account. Once the information is entered, please select 'Continue'

Enrollment and online account access

Step 14: Phone Verification

Validate Your Phone

We've texted a code to
*****4199

Enter Validation Code [SHOW](#)

CONTINUE

Can't find it? [Resend Code](#)

[Update Phone Number](#)

Need help?
[View our registration guide](#) or [FAQ](#)


1-800-448-2542
[TDD & Hours](#)

You will then be prompted to verify your phone number to create your online account. Once the information is entered, please select 'Continue'.

Step 15: Security Questions

Security Questions

Answer a few questions to protect your account.

 Note: Answers must contain at least five characters, and cannot include symbols (i.e., !, @, #, \$, %, ^, etc.)

▼

SHOW

▼

SHOW

▼

SHOW

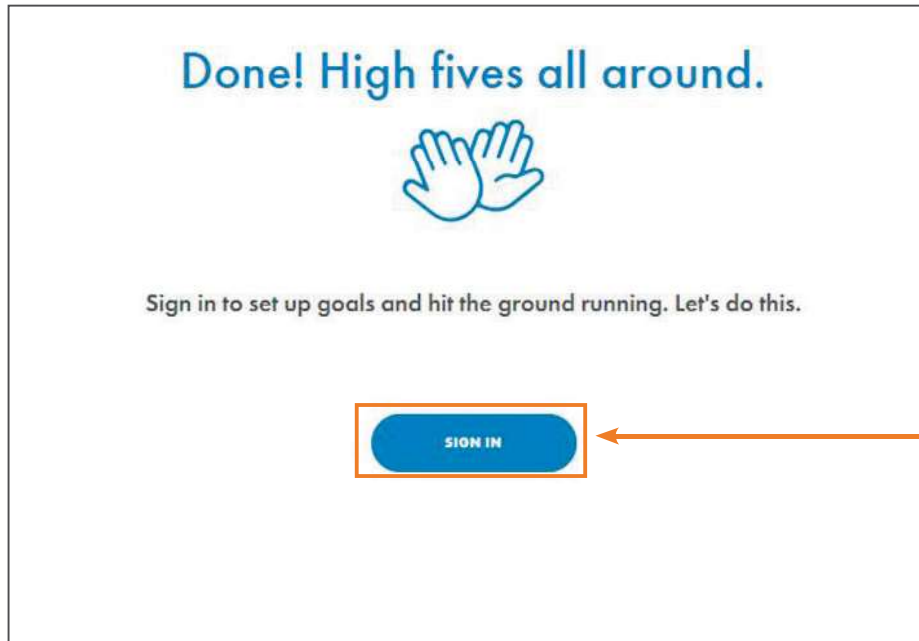
CONTINUE ←

Need help?
[View our registration guide](#) or [FAQ](#)
☎ 1-800-448-2542
[TDD & Hours](#) 🗓

For additional security, you will be prompted to answer security questions. Once the information is entered, please select 'Continue'.

Enrollment and online account access

Step 16: You're Registered



And you're done!
You can choose to sign in using your newly registered account to check your savings, view education content, get a FutureFIT calculation and more!

Enrollment and online account access

Step 17: Explore aig.com/RetirementServices

Once you register your account and sign in, you can now access various features on aig.com/RetirementServices. Your personal account information will not be available for at least 24 hours.

The screenshot displays the AIG Retirement Services website. At the top, the AIG logo is followed by "AIG Retirement Services" and navigation links for "ABOUT US", "FINANCIAL EDUCATION", "NEWS", and "CONTACT US". A "SIGN IN" button and a search icon are also present. The main banner features a smiling couple and the text "Plan for 100SM Think big. Plan bigger." with a "PLAY VIDEO" button. On the right, a "WELCOME" sign-in form includes fields for "USERNAME" and "PASSWORD", a "SIGN IN" button, and links for "SPONSORFIT[®] ACCESS" and "FORGOT USERNAME OR PASSWORD". At the bottom, there are two options: "Enroll and start saving in your employer's plan" with an "ENROLL" button, and "Already enrolled? Register to access your account online" with a "REGISTER" button.

Your Future is Calling. Meet It with Confidence.

CLICK aig.com/RetirementServices **CALL** 1-800-426-3753 **VISIT** your financial advisor

Armando Vazquez
Senior Financial Advisor
Cell 305-433-1790

Securities and investment advisory services offered through VALIC Financial Advisors, Inc. (VFA), member FINRA, SIPC and an SEC-registered investment adviser.

Annuities are issued by The Variable Annuity Life Insurance Company (VALIC), Houston, TX. Variable annuities are distributed by its affiliate, AIG Capital Services, Inc. (ACS), member FINRA.

AIG Retirement Services represents AIG member companies — The Variable Annuity Life Insurance Company (VALIC) and its subsidiaries, VALIC Financial Advisors, Inc. (VFA) and VALIC Retirement Services Company (VRSCO). All are members of American International Group, Inc. (AIG).

