Completing a Non-Financial Request:

The following instructions explain how to make non-financial changes to your voluntary retirement plan including:

- Name Changes
- Address Changes

NPA requires all forms necessary to complete a transactional request be submitted through NPA. Therefore, you should contact your financial representative or investment provider to get a copy of the paperwork they require to complete a Non-Financial Request.

Next, you will complete the NPA Transaction Authorization Form indicating your desire to process a Non-Financial Request on your account within your employer's plan. Fill out section one (1) of the TAF, providing general information about who you are, what school district(s) are involved, and what investment provider(s) are involved. When performing a Non-Financial Request, please fill out section three (3), "Non-Financial Request," on page three (3) of the TAF. Non-Financial Requests are the only type of requests that can be completed on the same TAF as another request. All other requests require a separate TAF. Complete the form by signing and dating the request on the third page. Please note that it is important to carefully read the entire TAF as it will assist you in completing it correctly.

For NPA to correctly and successfully process your request please submit the completed Transaction Authorization Form, and the completed investment provider Non-Financial Request paperwork to NPA via any of the means listed at the base of the TAF. Your financial representative can assist you in filling out and completing all forms.

Once your request has been reviewed and approved it will be forwarded to the applicable investment provider for processing.