

# MidAmerica 403(b)ulletin

WEDNESDAY, SEPTEMBER 30, 2009 – VOL. XVII

## UNIVERSAL AVAILABILITY NOTICE

In order to remain compliant with the new IRS regulations, beginning in 2009, each Plan Sponsor is required to distribute a Universal Availability Notice on an annual basis to all eligible employees. If you implemented your plan with us in 2009, the Employee Notice that we used to communicate the changes to your employees satisfies the 2009 requirement. If you implemented your plan with us prior to 2009, you must distribute a Universal Availability Notice to your eligible employees. Click on the links below to view two model versions of the Universal Availability Notice. The first version is for use if all of your employees are eligible. The second version is for use if your plan limits eligibility. Please choose the model notice that suits your plan, insert the employer and plan names in the notice as appropriate, and distribute to your eligible employees. The model notices are available online at [www.midamerica.biz/employers/retirement/403b-tpa-services/403b-general-information-and-bulletins](http://www.midamerica.biz/employers/retirement/403b-tpa-services/403b-general-information-and-bulletins). Once you've customized the notice for your plan, please email it to [Cheryl.Thall@midamerica.biz](mailto:Cheryl.Thall@midamerica.biz) and we will post the notice to your plan's MidAmerica and Spokeskids web pages.

[UA Notice – all employees eligible to participate](#)

[UA Notice – limits employees eligible to participate](#)

## CUSTOMER SERVICE

MidAmerica has a team of dedicated customer service representatives to assist with participant inquiries. If participants ask, it is important to direct them to our dedicated toll-free number (866) 873-4240 versus a specific extension or individual within MidAmerica. Our customer service representatives will assist the participant or route the call as appropriate.

## OUR NEW AND IMPROVED WEBSITE

Please visit our new website at [www.midamerica.biz](http://www.midamerica.biz). We provide our web service as a tool for you and your participants to access the most up-to-date information for your plan. As a Plan Sponsor, access employer level general 403(b) plan information by clicking on Employers and selecting 403(b) TPA Services. To view your specific plan information, click on Download Forms and start typing in your Employer name until your web page link appears below. Please direct your employees to do the same but by first clicking on Participants to view participant level plan information.

## NEW DATA UPLOAD PROCEDURES

You can now access our secure file upload sites through [www.midamerica.biz](http://www.midamerica.biz). We are now able to receive participant transaction paperwork and salary reduction agreements via secure file upload as well as contribution data for your plan. Click on Forms and select the appropriate upload page for the data you wish to submit. Just complete the fields, browse for your file and hit send.

## VENDOR AGREEMENTS

If you would like to add or remove vendors from your approved provider list, please email the request to [Kacie.Rogers@midamerica.biz](mailto:Kacie.Rogers@midamerica.biz). Once we are notified in writing to add a vendor to your plan, we will go through the process of having a Product Provider Service Agreement executed.

There are occasions when data sharing needs to occur with vendors that are no longer approved on your plan. We have an Inactive Product Provider Service Agreement available to accommodate those vendors.

## SALARY REDUCTION AGREEMENTS

We listened to your comments and suggestions and have updated our Salary Reduction Agreements to be more informative and user friendly. The appropriate SRA for your plan is available on your webpage as a type-able pdf.



**MidAmerica**

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