

403(b)/457(b) Plan Opportunities Tool

NAVIGATION GUIDE

Step 1 | Log into the Agent Portal. Under Sales & Marketing select Retirement Business and click on **403(b)/457(b) Plan Opportunities**

Step 2 | Search by state, city, county, zip code, or specific plan name using drop-down menus

Employer/Plan Sponsors

[New Plan Form\(4258\)](#)

If you do not see a specific employer plan, reach out to the appropriate Relationship Manager regarding the status. 1-866-243-7174 / retirementservices1@nationallife.com

Filter By: State  County  City  Zip Code  Employer/Schools District 

Step 3 | A Status listing of **Open** is a plan where National Life Group is an approved provider and is open for you to work. Best practice, reach out to the district Payroll Office, introduce yourself as a National Life Group agent, **confirm** that National Life Group is an approved provider, ask how the Salary Reduction Agreement is processed, and ask what solicitation rules are in place for you to make contact with employees.

Step 4 | A Status listing of **New Prospect** indicates that National Life Group is **not** an approved provider. Next steps would be to reach out to the plan and ask how new providers are added, e.g. Request for Proposal (RFP), names of employees that wish to work with you using NLG products or presentation of a proposal to the Board of Education are often the procedures used. Once you have discovered the process for having NLG added as a provider, reach out to your Relationship Manager to discuss strategies for having NLG approved.*

Step 5 | Employer/School Districts includes K-14 Public Schools which will include **Demographics** and **District** links to the National Center for Education Statistics: <https://nces.ed.gov/>

Step 6 | Non-Profits listed that are not a public school will have **Not Applicable** listed under the **Demographics** and **District** columns.

Step 7 | If you do not see a specific employer plan, reach out to the appropriate Relationship Manager to get a confirmation on the status of the plan.

*Please note that the Employer Information form used to add NLG as a new provider in a plan is located at the top of the tool – **New Plan Form (4258)**



Click [here](#) or scan the QR code for easy online access.

Please be aware that all marketing used in an NLG school slot requires prior review and approval by NLG compliance, even if the marketing does not mention NLG or its products. In addition, you may not email market to school addresses without prior permission from the school or district, prior approval of the email from NLG compliance, and verification from Retirement Services that you are allowed to market to this plan. National Life Group® is a trade name of National Life Insurance Company, Montpelier, VT, Life Insurance Company of the Southwest, Addison, TX and their affiliates. Each company of National Life Group is solely responsible for its own financial condition and contractual obligations. Life Insurance Company of the Southwest is not an authorized insurer in New York and does not conduct insurance business in New York.

No bank or credit union guarantee | Not a deposit | Not FDIC/NCUA insured | May lose value | Not insured by any federal or state government agency

Guarantees are dependent upon the claims-paying ability of the issuing company.

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