

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

NAVIGATION GUIDE

1. Access the Tool

Log into the Agent Portal, click on the Lightning Bolt icon drop down and select 403(b)/457(b) Plan Opportunities.



2. Locate Opportunities

Enter employer name or click on Filters to search by State, County, or City.

> Advanced Markets	Employer Plan Opportunities							
> Affiliated Recruiting					Plan Opportunities Na	vigation Guide		
> The CPA Advantage Program					New P	lan Form(4258)		
> Community Engagement	If you do not see a specific employer plan, reach out to the appropriate Relationship Manager regarding the status at							
> Market Yourself	retirementservices1@nationallife.com							
> Marketing Campaigns								
Multicultural Materials	Employer Name 🔹	Enter Employe	r Name Name*	٩	Filt			
> Product Marketing								
✓ Retirement Business	Filter by					×		
H Overview								
403(b)/457(b) Plan Opportunities	State	•	County	← Ci	ty	-		
Balanced Opportunities	Selected Filters (0)						
IRA: Individual & Small Business								
Payroll Slot Management					Apply			
Marco Marcolo etc								

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.

For Agent Use Only – Not For Use With The Public

3. Plan Status



Open Slot (Green Light) = NLG is an Approved Provider.

Prospect (Yellow Light) = NLG is not an Approved Provider. Call the Relationship Manager to discuss strategies to get NLG added (scan Plan Opportunities Dashboard QR code below).

Don't See a Plan (Red Light) = Plan has restrictions. Call the Relationship Manager for more information (scan Relationship Manager Map QR code below).

State 🔺	County ¢	City 🜲	Zip Code 🗘	Employer / School Districts 🝦	Status 韋	Demographics	District
					Open Slot	Demographics info link	District info link
					Prospect	Demographics info link	District info link

4. Plan Insights

Demographics column provides a link for more insights on the employer/school district. If you do not see the Demographics column, no information is available for that plan.

State 🔺	County ¢	City 🖨	Zip Code 🗘	Employer / School Districts ≑	Status ¢	Demographics	District
					Open Slot	Demographics info link	District info link
					Prospect	Demographics info link	District info link



Access the Relationship Manager Contact Information Map



Access the Plan Opportunities Dashboard