

User Guide

NBS Online
Salary Reduction Agreement
Instructions

You can start, change or cancel your 403(b) and 457(b) contributions online through National Benefit Services 24 hours a day seven days a week.

To get started, please follow the instructions below:

1. Go to www.nbsbenefits.com
2. Under “Account Access” dropdown select “Retirement Login”, then “Account Access” under Non-ERISA.
3. If you are a new user, click on “New User”. Use this code specific to your employer to get started, **20464B1**. If you are a registered user, enter your Social Security Number (SSN) with no dashes as a username and last 4 numbers of your SSN as a password. Click Login.
4. Create your unique username and password. Please follow the criteria that must be met in order to have a valid username and password. If you forget your username and/or password, please contact NBS by phone at 1(800)274-0503 option 5.
5. Submit to continue. You are ready to start, change or cancel your retirement contributions.
6. Click on the link provided specifically for the plan.
7. Click “Initiate Transfer Request” and “Get Started” under the change elections box.
8. First, select effective date. Click “Include” box to the right. In the drop down provided of the pre-tax and Roth deferrals, select the investment provider you have established an account with. Then input requested monthly dollar contribution amount.
9. Read the “disclaimer and disclosures” and mark the checkbox if you agree to the terms & conditions. Click Next.
11. Review a summary of the changes and submit. You will be provided a confirmation number informing you that NBS has received your request for the online SRA. Click done. Your online SRA has been received by NBS and is currently being processed. Your contributions will take effect for the associated effective date corresponding with your employer’s monthly SRA due date.
12. If you would like a copy of your SRA, under “Reports & Forms” click “Reports” then click on a Salary Reduction Agreement link to download or print any newly sent online SRAs.

For more information regarding your employer’s retirement plan

- Visit NBS website at www.nbsbenefits.com/non-erisa-403b-forms
- Call a representative at 1(800)274-0503 option 5
- Email at 403bservice@nbsbenefits.com

