

Vanguard Enrollment Procedure

Updated April 2026

1. Go to <https://investor.vanguard.com/accounts-plans/403b-plans/participant>
2. Scroll to the bottom and click on “**Fill out my 403(b) plan application**”
3. Enter employer “Bellmore-Merrick Central High School District”
 - a. Our plan number is **436823**
4. Complete the online application and submit
 - a. There are many model portfolios on the internet based on your risk level
5. When you receive an email from Vanguard stating that your account has been set up go to the next step
6. Go to the OMNI website and complete the “Salary Reduction Agreement Form” https://www.omni403b.com/forms_SRA_403b.aspx
 - a. Enter “NY” and “Bellmore-Merrick CHSD” this will take you to the SRA page
 - b. If you want **Vanguard to be the sole recipient** of 403(b) deductions, then click the first button -- **!!New!! 403(b) SRA Express Shortened Online Form** (this DOES NOT include 457-B deductions); this will STOP contributions to any other company
 - 1) If you contributed to a different 403(b) plan in the **same calendar year** as the Vanguard account, you must check the box just below the solid line and complete the required information
 - c. If you currently have a 403(b) with another company and you **wish to continue** that, then click on the second button -- **403(b) Online SRA Submission** you MUST indicate that you want to continue the deduction. If you DO NOT, the deductions will stop (this DOES NOT include 457(b) deductions)
 - d. You do not have to put an account number for the new Vanguard account
 - e. If you have questions about the OMNI SRA Form call Tina Yuksel in the Business office at 992-1028
7. Deductions will start within one to two pay periods after your application is processed