

TAX SHELTERED ANNUITY PARTICIPATION

Attached you will find the application for participation in the South Milwaukee School District's Tax Sheltered Annuity program. This program gives employees the opportunity to invest a portion of their earnings for retirement. In order to enroll in the program the employee must choose one of the six district approved vendors listed below. The employee should contact the vendor to set up an investment account. They will also need to complete the Salary Reduction Agreement and turn it into the Business Office. Any questions regarding the Tax Sheltered Annuity program can be directed to Blaise Paul, Director of Business Services.

TAX SHELTERED ANNUITY VENDOR LIST

1. **Voya Financial** (fka Aetna Ins & fka ING Financial Services)
Philip Barth (414-256-2181)
phil.barth@voyafa.com
10700 W Research Dr. Ste 190
Mayfair Woods Research Park
Milwaukee, WI 53226
2. **Ameriprise, Inc.** (fka American Express Financial Advisors & fka IDS)
Mark Karpfinger (262-641-4100)
mark.a.karpfinger@ampf.com
175 N. Patrick Blvd
Brookfield, WI 53045-5857
3. **AXA Equitable**
John Plumley (414-278-1508)
john.plumley@equitable.com
111 E. Kilbourn Avenue, Suite 800
Milwaukee, WI 53202
4. **Metropolitan Life/Metlife Resources**
WestPoint Financial Group
Bryan Gosda (414-615-4898)
bgosda@financialguide.com
9000 West Chester Street, Ste 100
Milwaukee, WI 53214
5. **WEA Member Benefits**
(800-279-4030)
retirement@weabenefits.com
P.O. Box 7893
Madison, WI 53707
6. **Wisconsin Deferred Compensation Program – 457(b)**
Department of Employee Trust Funds (877-457-9327)
wdcquestions@empower-retirement.com
5325 Wall Street, Suite 2755
Madison, WI 53718