

WINNETKA PUBLIC SCHOOLS TAX SHELTERED ANNUITY

For your information, employees may purchase a Tax Sheltered Annuity (TSA) pursuant to Section 403(b) of the Internal Revenue Code.

To begin a **Tax Sheltered Annuity** or make changes to a current TSA you must contact your company insurance agent.

You may tax shelter earnings with the purchase of a TSA in any amount up to the limit specified by the Internal Revenue Code. The amount to be invested is determined by the employee upon consultation with the appropriate insurance agent as listed below.

District 36, Traditional / Roth 403(b) Programs and Contacts:

Lincoln Investment Planning, Inc. (LIP)
(Formerly Kemper Investors Life Insurance)

Contacts: Justin C. Muro (630) 620-6100 x5711
Mona Konrath (630) 620-6100 x5734

Equitable Insurance (formerly AXA)

Contact: Jon Laven (224) 554-8066

Aspire Financial Services

www.aspireonline.com (866) 634-5873

Self-Directed OR Advisor

Advisor Contact: Jon Laven (224) 554-8066

Note: Our district is listed as “Cook County School District #36 BOE”

Horace Mann

Contact: Jason Ivy (224) 284-1642

District 36, Traditional / Roth 457 Contacts:

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If you would like to participate in this program or make any changes, please contact the appropriate representative.