

Napa Valley Unified School District
Approved 403(b) & ROTH 403(b) Vendor Listings
As of January 1, 2024

These vendors have signed an ISA and are approved by 403bcompare.com
(R) = Vendor that accept ROTH 403(b) contributions.

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|---|---|
| 1. American Century Investments #1164 (R) | 19. Lincoln Investment LLC #1068 (R) |
| 2. American Fidelity Assurance Co. #1062 | 20. MetLife #1073 (R) |
| 3. American Funds #1057 (R) | 21. Midland National #1043 |
| 4. American United Life (AUL) #1128 | 22. Modern Woodmen of America #1015 |
| 5. ASPIRE Financial - #1967 (R) | 23. National Life Group (LSW) #1036 (R) |
| 6. Brighthouse Financial #1073 (R) | 24. New York Life #1083 |
| 7. CTA Vol. Ret. Plan for Educators #1096 (R) | 25. North American Co. for Life & Health #1472 |
| 8. CalSTRS-Pension 2 #1097 (R) | 26. Orion Port. Solutions/FTJ #1148 (R) |
| 9. Corebridge Financial #1117 (R) | 27. Pacific Life Insurance Company #1130 |
| 10. Equitable #1067 (R) | 28. Plan Member Services #1127 (R) |
| 11. Fidelity Investments #1133 (R) | 29. Putnam Investments #1145 (R) |
| 12. Fiduciary Trust Co of New Hampshire #1042 | 30. ReliaStar Life Insurance Co - VOYA #1060 (R) |
| 13. Franklin Templeton Investments #1025 | 31. Security Benefit #1022 (R) |
| 14. GWN Securities Inc. #1113 (R) | 32. Thrivent Financial #1038 |
| 15. Horrace Mann #1014 (R) | 33. TIAA #1023 |
| 16. Industrial Alliance Pacific Life Ins Co #1135 (R) | 34. Vanguard #1102 (R) |
| 17. Invesco/Oppenheimer Funds #1121 (R) | 35. VOYA Financial, Inc. (formally ING) #1961 (R) |
| 18. Lincoln National Life (Lincoln Fin. Group)
#1029 (R) | |

457(b) & ROTH 457(b) Investment Providers:

1. Voya Retirement, Insurance and Annuity Co.
2. ReliaStar Life Insurance Company
3. Aspire
4. CalSTRS-Pension 2
5. First Investors
6. VALIC
7. Fiduciary Trust CO of New Hampshire

**For information and assistance in establishing
your 403(b), ROTH 403(b), 457(b) or ROTH
457(b) please call our plan support,
Planwithease.com.**

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