INSURANCE AND ANNUITIES MANAGEMENT:
DEFERRED COMPENSATION AND ANNUITIES
CRG (REGULATION)

MARKETING TAX-SHELTERED ANNUITIES

Any company wishing to market tax-sheltered annuities to District employees must observe the following guidelines:

1. The company must be a "certified company" on the current list maintained by TRS.

2. The District will not allow direct marketing activities in the form of general faculty presentations or phone calls during the school or work day. However, if requested by an employee, the company representative may meet the employee on school property outside the employee's workday. All such representatives must check in through the building office.

APPROVED – JANUARY 2015