

## BOARD APPROVED TSA CARRIERS

**NOTE:** IT IS THE EMPLOYEE'S RESPONSIBILITY TO CONTACT ANY OR ALL AGENTS TO DETERMINE THE BEST PLAN FOR THEMSELVES.

<b>ANNUITY COMPANIES</b>	<b>CONTACT PERSON</b>	<b>PHONE NUMBERS</b>
* 1. CONSOLIDATED FINANCIAL (Great American) (Lincoln Investment Planning)	Main Office Philip Hotz Todd Matthews	(248) 351-6000 (734) 765-2875 (248) 521-7013
2. EDWARD JONES	Chris Wolschleger Mike Johnson	(810) 229-6515 (810) 632-9533
3. AXA ADVISORS (EQUITABLE)	Zachary Greenman Tyler Thurston	(248) 641-2760 (248) 641-2650
*4. GLP AND ASSOCIATES (Voya, Franklin Templeton, National Life Group)	Adam Laurie Mike Sorka	(248)877-7733 (734)237-9443
5. MASS MUTUAL Ann Arbor Fin. Group	Steve Kenger	(734) 214-3980
6. PUTNAM (American Funds)	Jerry Repovz	(810) 231-7576
7. VANGUARD	No Representative	(800) 962-5068
* 8. VALIC/CoreBridge Financial	Dane Colberg	(517) 899-4969 (800) 892-5558 ext. 88667

**NOTE:** The TSA Representatives can guide you to setting up your 403B or 457 Plan. They have all of the forms that are needed in our office and it is their responsibility to see that those forms get to the schools' Business office.

**You will have 6 times in a calendar year to start, stop or make any changes to your TSA. Your form must be turned into the benefits office by the Friday before the payday.**

**Annual Contribution Limit amount for 2024 is \$23,000.00. It is your responsibility to make sure you do not over contribute.**

**\* These companies are the only companies approved by the district to do 457 Plans**