

TAX SHELTERED ANNUITIES (403b & 457 PLANS)

Employees may participate only in tax sheltered programs existing within the district. The following programs are approved for participation:

403b PLAN ADVISORS

Vendor	District Match	Contact Name	Phone Number		Email
Ameriprise Financial	Yes	Jeremy Steward	952	466-1239	jeremy.a.steward@ampf.com
Corebridge Financial (formerly VALIC)	Yes	David Wymer	952	838-7800	david.wymer@corebridgefinancial.com
		Andrew McConnell	952	838-7800	andrew.mcconnell@corebridgefinancial.com
Educators Financial Services, Inc.	Yes	Dean Ingvalson	952	452-9068	deani@tsainvest.com
		Michael Erickson	952	452-9066	michaele@efsadvisors.com
Equitable Life Assurance (formerly AXA)	Yes	David Sufficool	612	243-3268	david.sufficool@equitable.com
Fidelity Retirement Services	Yes	General Contact	800	343-0860	website: www.fidelity.com, Plan #52335
Waddell & Reed / Nationwide	Yes	Ryan Haddorff	952	852-1308	ryanhaddorff@wradvisors.com

457 PLANS - STATE OF MINNESOTA ADVISORS

Minnesota State Retirement System	No	MSRS	651	296-2761	info@msrs.us
-----------------------------------	----	------	-----	----------	--------------

For information about tax sheltered annuities and specific plans, contact a company representative. You may use any representative within the approved companies. The names listed above are listed for your convenience only. After your account is set up, please forward a copy of the district Salary Reduction Agreement to Human Resources.