

WCASD APPROVED 403B VENDOR LIST

The WCASD uses the OMNI GROUP, a Third Party Administrator, to handle our 403b Program
@ www.omni403b.com

1. Please select a Vendor from the list below and open an account.
2. Once your account is confirmed opened, go to the Omni website at www.omni403b.com to submit a Salary Reduction Agreement (SRA) to start payroll deductions. See Omni's brochure below for step by step instructions. *If you are retiring from the district please ignore steps 2 and 3.*
3. If payroll deductions have not started within two weeks of signing up with Omni, please contact Payroll at payroll@wcasd.net to inquire.

FIDELITY INVESTMENTS – Plan # 63110

<https://nb.fidelity.com/public/nb/atwork/home>

ADVISOR: NONE

PHONE NUMBER: 1- 800-835-5097

HORACE MANN – Plan #I0124984901

ADVISOR: Josh Winter 610-280-3411

EMAIL: <http://agents.horacemann.com/joshwinter>

VANGUARD - Plan #10101018

<https://personal.vanguard.com/us/whatweoffer/smallbusiness/403b7employees>

ADVISOR: NONE

PHONE NUMBER: 1- 800-662-2739

KADES MARGOLIS

<http://4kmc.com/>

ADVISOR: Greg Holman 1-800- 433-1828

EMAIL: gholman@4kmc.com

LINCOLN INVESTMENT PLANNING

<http://www.lincolninvestment.com>

ADVISOR: Joe Cosden – 610-353-1480

EMAIL:

MASS MUTUAL – Plan #K61087

<https://www.massmutual.com/>

ADVISOR: Michael Lynch Jr., 484-348-6213

EMAIL: mjlynch@financialguide.com

METLIFE

<http://www.creativefinancialgroup.com/>

ADVISOR: John Presta, 610- 355-4199

EMAIL: jpresta@1creative.com

PLAN MEMBER SERVICES CORP – Plan #021590000

<http://online.planmember.com/home.cfm>

ADVISOR: Kristin Webb, 610- 563-1776

EMAIL: Kristin_Webb@planmembersec.com

VOYA FINANCIAL – Plan #VT7186

<https://www.voya.com/products/403b-plans>

ADVISOR: Timothy Curry, 610-374-9201

EMAIL: Timothy.Curry@voyafa.com

VALIC – Plan #01755

https://www.valic.com/home_3240_422903.html

ADVISOR: Gina Colarulo, 215-444-6327

EMAIL: gina.colarulo@valic.com

AXA EQUITABLE – Plan #004893 001

<https://us.axa.com/teacher-retirement/403b/>

ADVISOR: Ethan Quirin

EMAIL: equirin@nextfinancial.com