

WALLINGFORD SWARTHMORE SCHOOL DISTRICT

200 SOUTH PROVIDENCE ROAD, WALLINGFORD, PENNSYLVANIA 19086
PHONE (610) 892-3470 ext. 1406 FAX (610) 892-3424

To: All WSSD employees

All employees of the Wallingford-Swarthmore School District are eligible to participate in 403(b) and/or 457(b) plans. To participate, the employee must choose an approved service provider and complete a Salary Reduction Agreement. Contributions are withheld from the employee's paycheck. Investment accounts, including 403(b) and 457(b) tax-deferred annuities and Roth 403(b) and Roth 457(b)'s, are subject to limitations on the amounts contributed by employees. The District does not contribute to this plan.

Those employees interested in enrolling or changing contributions to a 403(b) and/or 457(b) plan should visit the Third Party Administrator, ONMI/TSACG website at <https://www.tsacg.com/individual/plan-sponsor/pennsylvania/wallingford-swarthmore-school-district/>. The employee may contact any agent or the agents of the approved service providers listed below. Contact names listed are those that have been in touch with the District but may not be the only contacts available for each provider.

Authorized Investment Providers for the 403(b) and 457(b) TSA plans

<u>Equitable Advisors</u> www.equitable.com Contact: Matthew Johnston at 610-660-4268 1 Belmont Avenue, Bala Cynwyd, PA 19004-1797 Matthew.Johnston@equitable.com Contact: Steve Melchiorre at 610-660-4292 stephen.melchiorre@equitable.com	<u>Oppenheimer Funds</u> www.oppenheimerfunds.com Contact: Lou Capetola at 610-766-3018 Mass Mutual 2 Bala Plaza, Suite 901, Bala Cynwyd, PA 19004 Contact: Daniel J. Seal II at 610-937-1957 or 215-364-7610
<u>Brighthouse Life Insurance Company (formerly Met Life)</u> www.metlife.com Contact: Karen Nagle at 610-260-4025 610 Germantown Pike, Suite 210 Plymouth Meeting, PA 19462 Contact: John Presta at 484-431-7448 address same as above	<u>Security Benefit Group of Companies</u> www.securitybenefit.com Kades-Margolis Corporation Contact: Greg Field at 610-971-1080 x 131 gfield@4kmc.com or Contact: Dan Otto at 610-971-1080 x 130 dotto@4kmc.com 998 Old Eagle School Road, Suite 1220, Wayne, PA 19087
<u>Kades-Margolis Corporation- Money By Design</u> www.4kmc.com Contact: Greg Field at 610-971-1080 x 131 gfield@4kmc.com or Contact: Dan Otto at 610-971-1080 x 130 dotto@4kmc.com 998 Old Eagle School Road, Suite 1220, Wayne, PA 19087	<u>Vanguard Fiduciary Trust Company</u> www.vanguard.com Contact: 800-662-2003
<u>Lincoln Investment Planning</u> www.lincolninvestment.com Contact: Stephen Bach at 610-892-1718 or sbach@lincolninvestment.com 309 Henry Lane, Wallingford, PA 19086	<u>Variable Annuity Life Insurance Co. (VALIC)</u> www.aigretirement.com Contact: Dan Lex Jr. at 346-334-3499 307 Fellowship Road, Suite 205, Mount Laurel, NJ 08054
<u>Massachusetts Mutual Life (existing clients only)</u> www.massmutual.com Contact: Lou Capetola at 610-766-3018 2 Bala Plaza, Suite 90, Bala Cynwyd, PA 19004	<u>VOYA Financial</u> (formerly ING Life Ins. and Annuity Co.) Contact: Timothy Curry at 610-374-9201 P.O. Box 6383, Wyomissing, PA 19610 timothy.curry@voyafa.com Contact: Craig Kishel at 877-332-0673 830 S. Fillmore Street, Denver, CO 80209
<u>National Life Group (formerly LSW)</u> www.NationalLifeGroup.com Contact: Craig Kishel at 877-332-0673 830 South Fillmore Street, Denver, CO 80209 Contact: Stephen Gephart at 610-891-9700 or 484-883-7131 gephart_stephen@nlgroupmail.com 1400 N. Providence Road, Suite 117, Media, PA 19063	<u>Fiduciary Trust Company of New Hampshire (FTC)</u> (formerly Waddell & Reed Inc). www.waddell.com or www.lpl.comwaddell-red/access-your-account.html Contact: Kenneth Lesesne at 302-654-4298 800 Delaware Ave., Suite 810, Wilmington, DE 19801