



FBC Approved Provider List*

403(b) Provider Names

Below is a list of approved providers for the districts/schools that Schools First Plan Administration serves as third party administrator. All providers are registered with CalSTRS 403(b) Compare and have entered into an information sharing agreement with SchoolsFirst Plan Administration. More information regarding each provider is available by visiting www.403bcompare.com. The list of providers is subject to change.

American Century Investment***

American Fidelity Assurance Company*** (Pre-Tax and Roth)

Americo Financial Life and Annuity Insurance Company/Great Southern Life Insurance Company***

Ameriprise

AXA Equitable Life Insurance Company (Pre-Tax and Roth)

Brighthouse (formerly part of Metropolitan Insurance Co.)

CalSTRS Pension 2 (Pre-Tax and Roth)

Corebridge Financial (formerly AIG Retirement Services/VALIC)

CTA Voluntary Retirement Plans for Educators, LLC*** (Pre-Tax and Roth)

Empower Retirement (Pre-Tax and Roth)

Fidelity Investments (District Specific) ** (Pre-Tax and Roth)

Fiduciary Trust Company of New Hampshire (formerly Waddell & Reed/Ivy Investments)

Franklin Templeton Investments (Pre-Tax and Roth)

Global Atlantic Financial Group***

Great American Insurance Group (Annuity Investors Life Insurance Co.) (No New Accounts)

GWN Securities, Inc.

Horace Mann Investors, Inc.***

Horace Mann Life Insurance Company***

Industrial-Alliance Pacific Life Ins Co, US Branch.***

Invesco (formerly Oppenheimer Funds) (Pre-Tax and Roth)

Lincoln Financial Group (Lincoln National Life)***

Lincoln Investment, LLC

MassMutual (existing accounts only) ***

Matrix Trust Co. (formerly PenServ) (Pre-Tax and Roth)

Metropolitan Life Insurance Co.

Midland National (Pre-Tax and Roth)

Modern Woodman of America***

National Life Group (Pre-Tax and Roth)

New York Life Insurance & Annuity Corp.***

North American Company for Life and Health

Orion Portfolio Solutions (formerly FTJ FundChoice, LLC) (Pre-Tax and Roth)

PFS Investments Inc.***

PlanMember Securities Corp. (Pre-Tax and Roth)

Security Benefit Group

Thrivent Financial***

Transamerica Life Insurance Company (existing Transmark policies only)

USAA Life Insurance Company

Vanguard Group

Voya Reliastar Life Insurance Company

Voya Retirement Insurance and Annuity Company

** Not available to all districts. Please confirm availability with SchoolsFirst Plan Administration

*** Grossmont-Cuyamaca Community College District will no longer accept new SRA's for these vendors effective November 17, 2016

457(b) Provider Names

Empower Retirement

For more information, please contact SchoolsFirst Plan Administration



Call 800.462.8328, ext. 4727



Click www.schoolsfirstfcu.org



Email retirement@schoolsfirstfcu.org

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