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 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	Matrix Trust Co. *(formerly PenServ/First Investors/Foresters Financial)*
American Fidelity Assurance Company	Metropolitan Life Insurance Co.
American Funds Distributors, Inc. (AFD) (*District Specific*)	Midland National
American United Life (One America) (Existing policies only)	Modern Woodman of America
Americo Financial Life and Annuity Insurance Company/Great Southern Life Insurance Company	National Life Group (Life Insurance Company of the Southwest)
Ameriprise	New York Life Insurance & Annuity Corp.
Aspire	North American Company for Life and Health
Brighthouse (*formerly part of Metropolitan Insurance Co.*)	Orion Portfolio Solutions *(formerly FTJ FundChoice, LCC)*
CalSTRS Pension 2	Pacific Life Insurance Company
Corebridge Financial (*formerly AIG Retirement Services/Valic*	PFS Investments Inc.
CTA Voluntary Retirement Plans for Educators, LLC	PlanMember Securities Corp./PlanMember Services Corp.
Equitable Life Insurance Company	Putnam Investments
Fidelity Investments *(District Specific)*	SchoolsFirst FCU (Retirement Builder Plan through Nationwide Financial)
Franklin Templeton Investments	Security Benefit Group
Global Atlantic Financial Group	Thrivent Financial
Great American Insurance Group (Annuity Investors Life Insurance Co.) *(No New Accounts)*	Transamerica Life Insurance Company (existing Transmark policies only)
GWN Securities, Inc.	USAA Life Insurance Company
Horace Mann Investors, Inc.	Vanguard Group
Horace Mann Life Insurance Company	Victory Capital Management *(formerly USAA Investment Management Co.)*
Industrial-Alliance Pacific Life Ins Co, US Branch	Voya Reliastar Life Insurance Company
Invesco Formerly Oppenheimer Funds	Voya Retirement Insurance and Annuity Company
Lincoln Financial Group (Lincoln National Life)	
Lincoln Investment, LLC	
MassMutual *(Existing policies only)*	

457(b) Provider Names

SchoolsFirst FCU (Retirement Builder Plan through Nationwide Financial)	SchoolsFirst FCU Fixed 457(b) Share Certificate
Fidelity Investments *(District Specific)*	CalSTRS Pension 2 *(District Specific)*
	Security Benefit *(District Specific)*

For more information, please contact SchoolsFirst Plan Administration

Call 800.462.8328, ext. 4727 **Click** www.schoolsfirstfcu.org

Email retirement@schoolsfirstfcu.org

* This list is subject to change.
** Not available in all districts. Please confirm availability with SchoolsFirst Plan Administration

SCHOOLSFIRST PLAN ADMINISTRATION

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