

New Albany Floyd County Consolidated School Corporation

List of Approved Tax Shelter 403(b) Companies

<u>Company</u>	<u>Agent Name & Number</u>	<u>Type of Account</u>
VALIC	Gary Bridwell, Financial Advisor 812.322.2624 Cell 800.892.5558 ext. 87042 317.818.5900 District Office	Traditional 403(b)
AXA Advisors	Christopher Zingara 732.452.7310	Traditional 403(b)
Fidelity Retirement Svs.	800.544.6666	Traditional 403(b) Plan #83173 Roth 403(b) Plan #83173
First Investors Corp.	Noel Thompson 859.273.4095 ext. 305	Traditional 403(b)
Oppenheimer Funds	Michael Carter 812.981.8125 Thomas Jones 812.948.9201 Larry Ricke 812.944.4461 Boyd Wright 812.246.6628 Edward Jones Agents	Traditional 403(b) Roth 403(b)
TIAA-Cref	800.842.2638	Traditional 403(b)

The following steps will guide you through setting up your 403(b):

1. Contact one of the companies listed above and complete the enrollment application. If you already have a financial advisor you can contact them to see if they have the ability to work with any of the listed companies.
2. Complete a Salary Reduction Agreement to begin payroll deductions. Located on the NAFCS website under Staff>Staff Group Benefits or contact Human Resources to obtain form. Return completed form to Human Resources.

Questions? Contact: Melissa Gream
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