



To: Dr. Charles Johns
Board of Education

From: Vicki L. Tarver

Date: July 11, 2022

Re: Approval of Deferred Compensation Plans Authorized Providers

Recommendation

It is recommended that the Board of Education approve the list of deferred compensation providers/agents relative to the sale of deferred compensation plans to District 225 employees, per the terms of Board Policy 4070.

Background

As outlined in Section A.2 of Board Policy 4070: the assistant superintendent for business, or designee, shall at least annually, submit for Board of Education approval, a list of qualified providers from which District employees may purchase deferred compensation plans. All providers on the attached list comprise the District's authorized network, and all providers have been vetted through the District's third party administrator, TSA Consulting, Inc., and have signed the required service provider agreement.

The attached list of qualified providers has been updated to reflect any changes in company names (former name shown in parentheses) and/or contact information. Additionally, those providers who offer a 457(b) and/or 403(b) Roth have been identified separately.

No new providers have been added to this list.

DEFERRED COMPENSATION PLANS AUTHORIZED PROVIDERS/AGENTS

The following is a list of providers/agents authorized to sell deferred compensation plans to Glenbrook employees. Qualification of providers shall be based upon compliance with deferred compensation plan regulations, as amended from time to time, and execution of the service provider's agreement. Such qualification shall not be deemed as an endorsement by the District of any provider or plan.

403(b) PLANS	
AIG Retirement Services (VALIC)	800-448-2542
Ameriprise Financial	800-862-7919
Centera - MG Trust Company - Pen Select (formerly Foresters Financial)	800-354-5003
Equitable Life Insurance Company	800-628-6673
Fidelity Investments	800-343-0860
Great American Annuity Investors Life	800-854-3649
Horace Mann Insurance Company	800-999-1030
Invesco Oppenheimer Funds	800-959-4246
Lincoln Investment Planning, LLC	800-242-1421
Metropolitan Life Insurance Company (MetLife Resources)	800-560-5001
ReliaStar Life - Subsidiary of VOYA Financial	877-882-5050
Thrivent Financial	800-847-4836
VOYA Financial	800-584-6001
457(b) PLANS	
AIG Retirement Services (VALIC)	800-448-2542
Ameriprise Financial	800-862-7919
Centera - MG Trust Company - Pen Select (formerly Foresters Financial)	800-354-5003
Equitable Life Insurance Company	800-628-6673
Fidelity Investments	800-343-0860
Great American Annuity Investors Life	800-854-3649
Horace Mann Insurance Company	800-999-1030

Lincoln Investment Planning, LLC	800-242-1421
ReliaStar Life - Subsidiary of VOYA Financial	877-882-5050
Thrivent Financial	800-847-4836
<u>Roth 403(b) PLANS</u>	
AXA Equitable Life Insurance Company	800-628-6673
Centera - MG Trust Company - Pen Select (formerly Foresters Financial)	800-354-5003
Fidelity Investments - Plan Number 63141	800-343-0860
Lincoln Investment Planning, LLC	800-242-1421
Invesco Oppenheimer Funds	800-959-4246