



To: Dr. Michael Riggle
Board of Education

From: Vicki L. Tarver

Date: July 25, 2016

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.

DEFERRED COMPENSATION PLANS AUTHORIZED PROVIDERS/AGENTS

The following is a list of providers/agents authorized to sell deferred compensation plans to Glenbrook 225 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.

457 PLANS

Lincoln Investment Planning, Inc.

General phone # 630-620-6100 x5717
Jeffrey Smith, CFP 847-772-8865
jjsmith@lincolninvestment.com

4063(b) PLANS

AIG Retirement/VALIC

General phone # 800-448-2542
Kieron Inalsingh 773-301-7217

Ameriprise Financial

General phone # 800-862-7919

AXA Equitable / Equitable Ins. Co.

General phone # 800-628-6673
April Feinberg 847-346-7953
april.feinberg@axa-advisors.com
Todd Schlesinger 224-554-8067
todd.schlesinger@axa-advisors.com

Fidelity Investments

General phone # 800-343-0860

First Investors Corp

General phone # 800-423-4026
James Slater 630-705-1800 x227
james.slater@firstinvestors.com
Adam Dziubinski 630-705-1800
adam.dziubinski@firstinvestors.com

Great American Life Ins. Co.

General phone # 888-497-8556
Jesus Garcia 708-843-2002
Denise Izatt 630-571-6077
denise@enrichprivatewealth.com

Horace Mann Insurance Company

General phone # 800-999-1030
Timothy Frahm 847-323-5278
timothy.frahm@horacemann.com

ING Retirement Plans (Northern Life)

General phone # 800-584-6001
Margherita Johnson 708-460-4542
rita@johnson@yourbrokerfinancial.com
Glenn Dooner 847-302-6644
glenn.dooner@jpl.com

Lincoln Investment Planning, Inc.

General phone # 630-620-6100 x 5717
Jeffrey Smith, CFP 847-772-8865
jjsmith@lincolninvestment.com

Lincoln National Life (Lincoln Financial Group)

General phone # 800-893-7168

MetLife Resources

General phone # 800-560-5001

Oppenheimer Funds

General phone # 888-470-0862
Richard Hartzel 847-998-9869
rhartzel@sagepointadvisor.com
Fred Williams 847-428-6060
fred.williams@edwardjones.com
Mark Wimmer 312-674-4873
mark.wimmer@unitedcp.com