



**To:** Dr. Michael Riggle  
Board of Education

**From:** Vicki L. Tarver

**Date:** July 31, 2018

**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 403(b) Roth have been identified separately.

While no new providers have been added to this list, we have expanded our list of 457(b) providers to include all current companies on the 403(b) plan who offer the 457(b) plan. This will allow staff members additional opportunities for retirement savings.

## 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.

<b>403(b) PLANS</b>		
<b>Ameriprise Financial</b>		<b>800-862-7919</b>
<b>AXA Equitable Life Insurance Company</b>		<b>800-628-6673</b>
<i>April Feinberg</i>	<i>april.feinberg@axa-advisors.com</i>	<i>847-346-7953</i>
<i>Todd Schlesinger</i>	<i>todd.schlesinger@axa-advisors.com</i>	<i>224-554-8067</i>
<b>Fidelity Investments</b>		<b>800-343-0860</b>
<b>Foresters Financial (First Investors Corp)</b>		<b>800-423-4026</b>
<i>James Slater</i>	<i>james.slater@firstinvestors.com</i>	<i>630-705-1800 x 227</i>
<i>Adam Dziubinski</i>	<i>adam.dziubinski@firstinvestors.com</i>	<i>630-705-1800</i>
<b>Great American Annuity Investors Life</b>		<b>800-854-3649</b>
<i>Denise Izatt</i>	<i>denise@enrichprivatewealth.com</i>	<i>630-571-6077</i>
<b>Horace Mann Insurance Company</b>		<b>800-999-1030</b>
<i>Timothy Frahm</i>	<i>timothy.frahm@horacemann.com</i>	<i>847-323-5278</i>
<b>ING Retirement Plans</b>		<b>800-584-6001</b>
<i>Margherita Johnson</i>	<i>ritajohnson@yourbrokerfinancial.com</i>	<i>708-460-4542</i>
<i>Glenn Dooner</i>	<i>glenn.dooner@lpl.com</i>	<i>847-302-6644</i>
<b>Lincoln Investment Planning, LLC</b>		<b>800-242-1421</b>
<i>Matt Lowell</i>	<i>mlowell@LincolnInvestment.com</i>	<i>312-206-6288</i>
<i>Shawn Wears</i>	<i>swears@LincolnInvestment.com</i>	<i>630-620-6100 x 5703</i>
<b>Lincoln National Life Insurance Company</b>		<b>800-454-6265</b>
<b>Metropolitan Life Insurance Company (MetLife Resources)</b>		<b>800-638-5433</b>
<b>Oppenheimer Funds</b>		<b>888-470-0862</b>
<i>Richard Hartzel</i>	<i>rhartzel@sagepointadvisor.com</i>	<i>847-998-9869</i>
<i>Fred Williams</i>	<i>fred.williams@edwardjones.com</i>	<i>847-428-6060</i>
<i>Mark Wimmer</i>	<i>mark.wimmer@unitedcp.com</i>	<i>312-674-4873</i>

<b>ReliaStar Life Insurance Co (A VOYA Company)</b>		<b>877-882-5050</b>
<b>Thrivent Financial for Lutherans</b>		<b>800-847-4836</b>
<b>VALIC (AIG Retirement)</b>		<b>800-448-2542</b>
<i>Todd J. Nathan, MBA</i>	<i>todd.nathan@valic.com</i>	<i>847-477-6427</i>
<i>Kieron Inalsingh</i>		<i>773-301-7217</i>
<b>VOYA Financial</b>		<b>800-628-6673</b>
<b>457(b) PLANS</b>		
<b>Ameriprise Financial</b>		<b>800-862-7919</b>
<b>AXA Equitable Life Insurance Company</b>		<b>800-628-6673</b>
<i>April Feinberg</i>	<i>april.feinberg@axa-advisors.com</i>	<i>847-346-7953</i>
<i>Todd Schlesinger</i>	<i>todd.schlesinger@axa-advisors.com</i>	<i>224-554-8067</i>
<b>Fidelity Investments</b>		<b>800-343-0860</b>
<b>Foresters Financial (First Investors Corp)</b>		<b>800-423-4026</b>
<i>James Slater</i>	<i>james.slater@firstinvestors.com</i>	<i>630-705-1800 x 227</i>
<i>Adam Dziubinski</i>	<i>adam.dziubinski@firstinvestors.com</i>	<i>630-705-1800</i>
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<i>Denise Izatt</i>	<i>denise@enrichprivatewealth.com</i>	<i>630-571-6077</i>
<b>Horace Mann Insurance Company</b>		<b>800-999-1030</b>
<i>Timothy Frahm</i>	<i>timothy.frahm@horacemann.com</i>	<i>847-323-5278</i>
<b>Lincoln Investment Planning, LLC</b>		<b>800-242-1421</b>
<i>Matt Lowell</i>	<i>mllowell@LincolnInvestment.com</i>	<i>312-206-6288</i>
<i>Shawn Wears</i>	<i>swears@LincolnInvestment.com</i>	<i>630-620-6100 x 5703</i>
<b>Metropolitan Life Insurance Company (MetLife Resources)</b>		<b>800-638-5433</b>
<b>Oppenheimer Funds</b>		<b>888-470-0862</b>
<i>Richard Hartzel</i>	<i>rhartzel@sagepointadvisor.com</i>	<i>847-998-9869</i>
<i>Fred Williams</i>	<i>fred.williams@edwardjones.com</i>	<i>847-428-6060</i>
<i>Mark Wimmer</i>	<i>mark.wimmer@unitedcp.com</i>	<i>312-674-4873</i>
<b>ReliaStar Life Insurance Co (A VOYA Company)</b>		<b>877-882-5050</b>
<b>Thrivent Financial for Lutherans</b>		<b>800-847-4836</b>

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<i>Todd J. Nathan, MBA</i>	<i>todd.nathan@valic.com</i>	<i>847-477-6427</i>
<i>Kieron Inalsingh</i>		<i>773-301-7217</i>
<b>VOYA Financial</b>		<b>800-628-6673</b>
<b>Roth 403(b) PLANS</b>		
<b>AXA Equitable Life Insurance Company</b>		<b>800-628-6673</b>
<i>April Feinberg</i>	<i>april.feinberg@axa-advisors.com</i>	<i>847-346-7953</i>
<i>Todd Schlesinger</i>	<i>todd.schlesinger@axa-advisors.com</i>	<i>224-554-8067</i>
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