



To: Dr. Michael Riggle
Board of Education

From: Vicki L. Tarver

Date: July 24, 2017

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.

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		
Ameriprise Financial		800-862-7919
AXA Equitable Life Insurance Company		800-628-6673
<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>
Fidelity Investments		800-343-0860
Foresters Financial (First Investors Corp)		800-423-4026
<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>
Great American Annuity Investors Life		800-854-3649
<i>Denise Izatt</i>	<i>denise@enrichprivatewealth.com</i>	<i>630-571-6077</i>
Horace Mann Insurance Company		800-999-1030
<i>Timothy Frahm</i>	<i>timothy.frahm@horacemann.com</i>	<i>847-323-5278</i>
ING Retirement Plans		800-584-6001
<i>Margherita Johnson</i>	<i>ritajohnson@yourbrokerfinancial.com</i>	<i>708-460-4542</i>
<i>Glenn Dooner</i>	<i>glenn.dooner@ipl.com</i>	<i>847-302-6644</i>
Lincoln Investment Planning, LLC		800-242-1421
<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>
Lincoln National Life Insurance Company		800-454-6265
Metropolitan Life Insurance Company (MetLife Resources)		800-638-5433
Oppenheimer Funds		888-470-0862
<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>

ReliaStar Life Insurance Co (A VOYA Company)		877-882-5050
Thrivent Financial for Lutherans		800-847-4836
VALIC (AIG Retirement)		800-448-2542
<i>Kieron Inalsingh</i>		773-301-7217
457(b) PLANS		
AXA Equitable Life Insurance Company		800-628-6673
<i>April Feinberg</i>	<i>april.feinberg@axa-advisors.com</i>	847-346-7953
<i>Todd Schlesinger</i>	<i>todd.schlesinger@axa-advisors.com</i>	224-554-8067
Lincoln Investment Planning, LLC		800-242-1421
<i>Matt Lowell</i>	<i>mlowell@LincolnInvestment.com</i>	312-206-6288
<i>Shawn Wears</i>	<i>swears@LincolnInvestment.com</i>	630-620-6100 x 5703
Roth 403(b) PLANS		
AXA Equitable Life Insurance Company		800-628-6673
<i>April Feinberg</i>	<i>april.feinberg@axa-advisors.com</i>	847-346-7953
<i>Todd Schlesinger</i>	<i>todd.schlesinger@axa-advisors.com</i>	224-554-8067
Fidelity Investments		800-343-0860
Foresters Financial (First Investors Corp)		800-423-4026
<i>James Slater</i>	<i>james.slater@firstinvestors.com</i>	630-705-1800 x 227
<i>Adam Dziubinski</i>	<i>adam.dziubinski@firstinvestors.com</i>	630-705-1800
Lincoln Investment Planning, LLC		800-242-1421
<i>Matt Lowell</i>	<i>mlowell@LincolnInvestment.com</i>	312-206-6288
<i>Shawn Wears</i>	<i>swears@LincolnInvestment.com</i>	630-620-6100 x 5703
Oppenheimer Funds		888-470-0862
<i>Richard Hartzel</i>	<i>rhartzel@sagepointadvisor.com</i>	847-998-9869
<i>Fred Williams</i>	<i>fred.williams@edwardjones.com</i>	847-428-6060
<i>Mark Wimmer</i>	<i>mark.wimmer@unitedcp.com</i>	312-674-4873