

Under the regulations set forth by the Internal Revenue Service you have the available to have funds withheld from your check on a pre-tax basis for deposit to a 403(b), 457 or ROTH IRA retirement annuity account.

If you are not interested in a 403(b),457 or a ROTH IRA annuity account mark the not interested box at the top, complete employee information, sign the bottom and date it.

EMPLOYEES UNDER REGULAR CONTRACT (NOT SUPPLEMENTAL)

- Various options are available based on type of contract and employee's decisions regarding health insurance under the Master Contract.

Under IRS Regulations:

EMPLOYEES UNDER SUPPLEMENTAL CONTRACT

- Since supplemental contracts are paid in three (3) installments you can either have a percentage of your check withheld or a fixed amount from each check.

SUBSTITUTE EMPLOYEES

- Substitute employees who choose to have funds withheld from their checks for deposit into a 403(b) or 457 annuity accounts must choose a percentage of their gross check for withholding. Inconsistent work schedules preclude a fixed amount for withholding.

APPROVED VENDORS

- The following is the list of approved vendors. These are the only companies accepted for payroll deduction.

1. Corebridge Financial (AIG Variable Annuity Life (VALIC))
2. American Fidelity
3. Aspire
4. Ameriprise
5. Equitable
6. VOYA (use to be ING)
7. Metropolitan Life
8. Midland Annuity Division
9. Ohio Deferred Compensation 457plan only
10. Equitable

We are not promoting these agents. You may pick any company on the list with any agent.

We only have the following representative names because these are the only ones that ever come to the school or call:

Edward Jones
Aspire 403b, Roth 403b and 457 Plan
Trevor Webster
419-232-2057
Trevor.Webster@edwardjones.com

Ohio Deferred Compensation
457 Plan and Roth 457 Plan (Pre and Post Tax)
Brent Tabler
1-877-644-6457
tablerb@nationwide.com

VOYA Financial Planners
457 Plan and Roth 457 Plan
Matt Carter
800-451-4702
Matthew.Carter@voyafa.com

Wright Insurance Services- Midland 403b
Randy Wright
419-438-6365
rwright@defnet.com

American Fidelity Assurance Company
403b, 457 Plan and Roth 457 Plan
Amber Italiano
614-306-5862
Amber.Italiano@americanfidelity.com

Equitable
403b, 457 Plan and Roth 457 Plan
Alex Solove
614-425-2104
alexander.solove@equitable.com

COREBRIDGE FINANCIAL(Pre and Post Tax)
403b, 457Plan and Roth 457Plan
William G. (Bill) Williams
Cell 419-279-4122
william.g.williams@corebridgefinancial.com