

Tax Sheltered Annuities – 403(b) Plans & 457 Plans

The Chester County Intermediate Unit offers employees an option to enroll in a tax sheltered annuity or 403(b) plan. A 403(b) plan is a deferred compensation retirement agreement that may be entered into only by employees of public educational systems and of other specific tax-exempt organizations. **If you are interested in starting a 403(b) plan, you must contact an approved vendor from the list below to open an account. Once you have selected a vendor and have an account which is open and ready to receive funds from the Chester County Intermediate Unit, you must complete the salary reduction agreement and return it to the payroll department.** The CCIU uses a third party administrator, TSA Consulting Group, who is responsible for all required signatures, transfers, or rollovers. You can go to the CCIU website/ HR / Frequently Asked Questions/ Tax Sheltered Annuities (TSA) and click the link to be redirected to TSA's website and learn more about the Chester County Intermediate Unit's 403(b) and 457 plans and print all required forms.

Investment Company / Insurance Carrier	Representative	Telephone	Website / Email Address
* EQUITABLE ADVISORS	Joshua Redmond Grayson Wingert	800-628-6673 610-660-4321 717-524-6733	www.equitable.com joshua.redmond@equitable.com grayson.wingert@equitable.com
* HORACE MANN LIFE INSURANCE COMPANY	Josh Winter Scott Lucas	800-999-1030 610-280-3411 610-910-4064	www.horacemann.com Josh.Winter@horacemann.com Scott.Lucas@horacemann.com
* KADES MARGOLIS CORP-MONEY BY DESIGN	Shawn Anderson John McCauley	800-433-1828 Ext 234 800-433-1828 Ext 126 610-368-5604	www.4kmc.com sanderson@4kmc.com jmccauley@4kmc.com
* LINCOLN INVESTMENT PLANNING	Cindy Miller	800-242-1421 215-885-7115 Ext 1327	www.lincolninvestment.com cymiller@lincolninvestment.com
MASSACHUSETTS MUTUAL LIFE (Existing clients only)	Michael Lynch	800-272-2216 484-348-6213	www.massmutual.com mjlynch@financialguide.com
METLIFE INVESTORS INS CO.	Karen Nagle	833-642-1008 610-269-2545	www.metlife.com knagle@metlife.com
* SECURITY BENEFIT	Shawn Anderson John McCauley	800-888-2461 800-433-1828 Ext 234 800-433-1828 Ext 126	www.securitybenefit.com sanderson@4kmc.com jmcauley@4kmc.com
VANGUARD Plan Number 434079	Ascensus	888-652-8086	www.vanguard.com
* WADDELL & REED INC	Ted Sweeney	888-923-3355 610-374-6249 Ext 101	www.waddell.com

* Denotes company also offers 457 Plans