

## Tax Sheltered Annuities – 403(b) Plan

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) plan and print all required forms.

Investment Company / Insurance Carrier	Representative	Telephone	Email Address
AXA EQUITABLE LIFE INSURANCE COMPANY	Joshua Redmond	800-628-6673 610-660-4321	<a href="http://www.axa-equitable.com">www.axa-equitable.com</a> <a href="mailto:joshua.redmond@axa-advisors.com">joshua.redmond@axa-advisors.com</a>
HORACE MANN LIFE INSURANCE COMPANY	Josh Winter Scott Lucas	800-999-1030 610-280-3411 610-910-4064	<a href="http://www.horacemann.com">www.horacemann.com</a> <a href="mailto:Josh.Winter@horacemann.com">Josh.Winter@horacemann.com</a> <a href="mailto:Scott.Lucas@horacemann.com">Scott.Lucas@horacemann.com</a>
KADES MARGOLIS CORP-MONEY BY DESIGN	John McCauley	800-433-1828 800-433-1828 Ext 126	<a href="http://www.moneybydesign.biz">www.moneybydesign.biz</a> <a href="mailto:jmccauley@4kmc.com">jmccauley@4kmc.com</a>
LINCOLN INVESTMENT PLANNING	Doris Abelson Len Rossati	800- 242-1421 800-242-1421 Ext 1394 800-242-1421 Ext 1222	<a href="http://www.lincolninvestment.com">www.lincolninvestment.com</a>
METLIFE INVESTORS INS CO.	Karen Nagle	570- 478-4222 610-269-2545	<a href="http://www.metlife.com">www.metlife.com</a> <a href="mailto:knagle@metlife.com">knagle@metlife.com</a>
SECURITY BENEFIT	John McCauley	800- 888-2461 800-433-1828 Ext 126	<a href="http://www.securitybenefit.com">www.securitybenefit.com</a> <a href="mailto:jmccauley@4kmc.com">jmccauley@4kmc.com</a>
VANGUARD	Newport Group	800-569-4903	<a href="http://www.vanguard.com">www.vanguard.com</a>
WADDELL & REED INC	Frank Sabatucci	888- 923-3355 610-374-6249	<a href="http://www.waddell.com">www.waddell.com</a>