

PIERZ INDEPENDENT SCHOOL DISTRICT 484

TAX SHELTERED ANNUITIES LIST OF AVAILABLE VENDORS

	<u>Phone Number for National Office</u>
1. Ameriprise	800-862-7919
2. Aspire	813-830-9300
3. Equitable	800-628-6673
4. ESI Education Minnesota	877-403-2374
5. Franklin Templeton	800-527-2020
6. Horace Mann	800-999-1030
7. Met Life-Metropolitan Mutual Life	800-560-5001
8. Thrivent Financial	800-847-4836

403(b) Account Process:

- Employee contacts vendor or financial advisor directly to establish an account.
- Employee then fills out the salary reduction agreement form and obtains agent signature.
- Once the agreement is signed, submit to Payroll to start payroll deductions.

Local Agents:

Horace Mann –Daniel Germundson 218-208-5365

Focus Financial – Alicia Kapus 320-639-1005