



**INTERMEDIATE SCHOOL DISTRICT #917**  
**1300 145th Street East**  
**Rosemount, Minnesota 55068-2999**

**Effective April 1, 2017**

As a new or current employee of the school district you are allowed to enroll in the Tax-Sheltered Annuities (TSA: 403(b), 457 and Roth 403b). Listed below are the approved district vendors:

<u>TSA Vendor:</u>	<u>Contact:</u>
<b>Ameriprise</b> <i>403(b) only</i>	Sam Thompson 651-219-5050 sam.thompson@ampf.com
<b>AXA Equitable Life Assurance</b> <i>403(b) and Roth 403(b) only</i>	Paul Remus 612-243-3230 Paul.Remus@axa-advisors.com
<b>Educators Financial Services, Ins (ESI)</b> <i>403(b) and Roth 403(b) only</i>	Joshua Decker 651-292-4895 / 612-940-3587 (cell) Josh.decker@edmn.org
<b>Fidelity Investments</b> <i>403(b) only for Plan #: 67451</i>	1-800-343-0860 <u>Fidelity is accepting contributions only set up through the number listed and not independent advisors.</u>
<b>Horace Mann Life Insurance</b> <i>403(b) only</i>	Sue Grieme 952-423-3647 ext. 3 sue.grieme@horacemann.com  Scott Wright 952-431-2121 scott.wright@horacemann.com
<b>Minnesota Deferred Comp Plan (MSRS)</b> <i>403(b) only</i>	1-877-457-6466 Website for forms: www.mndcplan.com
<b>Valic</b> (formerly AIG Retirement) <i>403(b) and Roth 403(b) only</i>	Josh Nokes 952-838-7800 Joshua.nokes@valic.com
<b>Voya Financial</b> (formerly ING – Aetna Life Insurance) <i>403(b) only</i>	Michael Stein 612-492-0213 mstein@steifg.com
<b>Waddell &amp; Reed</b> <i>403(b) and Roth 403(b) only</i>	Ryan Haddorff 952-852-1308 ryanhaddorff@wradvisors.com  Bradley Moir 651-452-8050 bmoir@wradvisors.com