

MEMORANDUM

SHALER AREA SCHOOL DISTRICT

PAYROLL DEPARTMENT

DATE: August 12, 2015

TO: ALL EMPLOYEES

FROM: CHARLES BENNETT, Director of Business Affairs

RE: Shaler Area School District 403(b) PROGRAMS

SHALER AREA SCHOOL DISTRICT LIST OF 403(b) SERVICE PROVIDERS

NAME	AGENT	PHONE #
Voya Retirement Insurance & Annuity Co. (VRIAC) – (formerly ING)	Greg Jacobs	412-967-2608
American Funds Service Co.	Dave Cashdollar	724-458-5233 800-421-0180
Equitable Life Assurance Co. AXA	James Stewart	412-392-2639
Fidelity Investment (NO ROTH)	Client Services	800-343-0860
Plan Member Services	Reed Harvey	724-869-4576
Lincoln Investment Planning	Donna Wren Eric Rosen	412-231-7960
Lincoln Financial Group	Kevin Tatar	724-940-6320
Employee Benefit Account (Symetra) Colonial Bank/GWN Marketing	Douglas Hervey Nicholas Swanson	800-433-1828 724-983-1183
Waddell & Reed	Robert Half James Sullivan	412-243-5350 412-487-4144