

# WALLINGFORD SWARTHMORE SCHOOL DISTRICT

200 SOUTH PROVIDENCE ROAD, WALLINGFORD, PA 19086 PHONE (610) 892-  
3470 ext. 1406 FAX (610) 892-3497

To: All WSSD employees

All employees of the Wallingford-Swarthmore School District are eligible to participate in 403(b) and/or 457(b) plans. To participate, the employee must choose an approved service provider and complete the District's Salary Reduction Agreement. Contributions are withheld from the employee's paycheck. Investment accounts, including 403(b) and 457(b) tax-deferred annuities and Roth 403(b) and Roth 457(b)'s, are subject to limitations on the amounts contributed by employees. The District does not contribute to this plan.

Those employees interested in enrolling in a 403(b) and/or 457(b) plans should visit the District's website or contact the Human Resources Office at extension 1406. The employee may contact any agent or the agents of the approved service providers listed below. Contact names listed are those that have been in touch with the District but may not be the only contacts available for each provider.

### Authorized Investment Providers for This 403(b) TSA Plan

<p><b><u>Equitable Advisors</u></b> <a href="http://www.equitable.com">www.equitable.com</a> Contact: Ernest L. Repice at 610-660-4108 1 Belmont Avenue, Bala Cynwyd, PA 19004-1797 <a href="mailto:Ernest.repice@equitable.com">Ernest.repice@equitable.com</a> Contact: Matthew Johnston at 610-660-4268 1 Belmont Avenue, Bala Cynwyd, PA 19004-1797 <a href="mailto:Matthew.johnston@equitable.com">Matthew.johnston@equitable.com</a> Contact: Steve Melchiorre at 610-660-4292 <a href="mailto:stephen.melchiorre@equitable.com">stephen.melchiorre@equitable.com</a></p>	<p><b><u>Invesco Oppenheimer Funds</u></b> <a href="http://www.oppenheimerfunds.com">www.oppenheimerfunds.com</a> Contact: Lou Capetola at 610-766-3018 Mass Mutual 2 Bala Plaza, Suite 901, Bala Cynwyd, PA 19004 Contact: Daniel J. Seal II 610-937-1957 or 215-364-7610</p>
<p><b><u>Brighthouse Life Insurance Company (formerly Met Life)</u></b> <a href="http://www.metlife.com">www.metlife.com</a> Contact: Karen Nagle at 610-260-4025 610 Germantown Pike, Suite 210 Plymouth Meeting, PA 19462 Contact: John Presta at 484-431-7448 address same as above</p>	<p><b><u>Security Benefit Group</u></b> <a href="http://www.securitybenefit.com">www.securitybenefit.com</a> Contact: Greg Field at 610-971-1080 x 131 Kades-Margolis Corporation 998 Old Eagle School Road, Suite 1220, Wayne, PA 19087 <a href="mailto:gfield@4kmc.com">gfield@4kmc.com</a> Contact: Dan Otto at 610-971-1080 x 130 Kades-Margolis Corporation 998 Old Eagle School Road, Suite 1220, Wayne, PA 19087 <a href="mailto:dotto@4kmc.com">dotto@4kmc.com</a></p>
<p><b><u>Kades-Margolis Corporation- Money By Design</u></b> <a href="http://www.4kmc.com">www.4kmc.com</a> Contact: Greg Field at 610-971-1080 x 131 998 Old Eagle School Road, Suite 1220, Wayne, PA 19087 <a href="mailto:gfield@4kmc.com">gfield@4kmc.com</a> Contact: Dan Otto at 610-971-1080 x 130 998 Old Eagle School Road, Suite 1220, Wayne, PA 19087 <a href="mailto:dotto@4kmc.com">dotto@4kmc.com</a></p>	<p><b><u>Vanguard Fiduciary Trust Company</u></b> <a href="http://www.vanguard.com">www.vanguard.com</a> Contact: 800-569-4903</p>
<p><b><u>Lincoln Investment Planning</u></b> <a href="http://www.lincolninvestment.com">www.lincolninvestment.com</a> Contact: Stephen Bach at 610-892-1718 or <a href="mailto:sbach@lincolninvestment.com">sbach@lincolninvestment.com</a> 309 Henry Lane, Wallingford, PA 19086</p>	<p><b><u>Corebridge Financial (formerly AIG/VALIC)</u></b> <a href="mailto:Dan.lex@aig.com">Dan.lex@aig.com</a> Contact: Dan Lex Jr. at 346-334-3499 307 Fellowship Road, Suite 205 Mount Laurel, NJ 08054</p>
<p><b><u>Massachusetts Mutual Life (existing clients only)</u></b> <a href="http://www.massmutual.com">www.massmutual.com</a> Contact: Lou Capetola at 610-766-3018 2 Bala Plaza, Suite 90, Bala Cynwyd, PA 19004</p>	<p><b><u>VOYA Financial and ReliaStar Life (a subsidiary of VOYA)</u></b> Contact: Timothy Curry at 610-374-9201 P.O. Box 6383, Wyomissing, PA 19610 <a href="mailto:timothy.curry@voyafa.com">timothy.curry@voyafa.com</a> Contact: Craig Kishel at 877-332-0673 830 S. Fillmore Street, Denver, CO 80209</p>
<p><b><u>National Life Group (formerly LSW)</u></b> <a href="http://www.NationalLifeGroup.com">www.NationalLifeGroup.com</a> Contact: Craig Kishel at 877-332-0673 830 South Fillmore Street, Denver, CO 80209 Contact: Stephen Gephart at 610-891-9700 or 484-883-7131 <a href="mailto:gephart_stephen@nlgroupmail.com">gephart_stephen@nlgroupmail.com</a> 1400 N. Providence Road, Suite 117, Media, PA 19063</p>	<p><b><u>Fiduciary Trust Company of New Hampshire (FTC)</u></b> (prev. <b><u>Waddell &amp; Reed Inc.</u></b>) <a href="http://www.waddell.com">www.waddell.com</a> <a href="http://www.fpl.com/waddell-reed/access-your-account.html">www.fpl.com/waddell-reed/access-your-account.html</a> Contact: Kenneth Lesesne at 302-654-4298 800 Delaware Ave., Suite 810, Wilmington, DE 19801</p>