

Optional 403(B)/Roth 457

Eligible Employee:

You are able to participate in a tax-sheltered investment program through the payroll deduction method as authorized under Section 403(b) and Section 457 of the Internal Revenue Code, School District Policy, and as otherwise provided by law.

You can contribute your own dollars. For information regarding matching funds, please see individual employment agreements and collective bargaining agreements.

To Enroll:

Chose a company from the vendor list and complete the Salary Reduction Agreement

APPENDIX 1 – APPROVED VENDORS

RED WING ISD #256

Only to be completed if the Employer has elected to permit exchanges and transfers with vendors who are currently authorized to maintain an active 403(b) payroll slot with the Employer.

IMPORTANT: If the UVA box has been checked, that vendor may accept transfers/exchanges from the Districts Participants. If the UVA box has not been checked, that vendor shall not receive transfers/exchanges from Participants.

Name of Organization	Contact	Phone	UVA
403bASP			X
Franklin Templeton Investors Services			X
Thrivent Financial			X
Equitable			X
Waddell & Reed			X
FTJ Fund Choice (Specific Agent Only)			X
ESI Education Minnesota			X
ReliaStar Life Insurance Co.			X
Vanguard			X
Ameriprise Financial Services Inc.			X
Horace Mann Life Insurance			X