

GLENBROOK HIGH SCHOOLS
Office of the Assistant Superintendent for Business/CSBO
Regular Meeting Monday, July 27, 2015

TO: Dr. Michael Riggle

FROM: Hillarie Siena

DATE: July 27, 2015

RE: Discussion/Action: Approval of Deferred Compensation Plans Authorized Providers

Attached is a list of deferred compensation providers/agents relative to the sale of deferred compensation plans to District 225 employees, per the terms of Board Policy 4070. As outlined in Section A.2 of the policy: the assistant superintendent for business, or designee, shall at least annually, submit for Board of Education approval, a list of qualified providers from which District employees may purchase deferred compensation plans. All providers on the list comprise the District's authorized network, and all providers have been vetted through the District's third party administrator, TSA Consulting, Inc., and have signed the required service provider agreement.

DEFERRED COMPENSATION PLANS AUTHORIZED PROVIDERS/AGENTS

The following is a list of providers/agents authorized to sell deferred compensation plans to Glenbrook employees. Qualification of providers shall be based upon compliance with deferred compensation plan regulations, as amended from time to time, and execution of the service provider's agreement. Such qualification shall not be deemed as an endorsement by the District of any provider or plan.

457 PLANS

Lincoln Investment Planning, Inc jjsmith@lincolninvestment.com	General phone # Jeffrey Smith, CFP	630-620-6100x5717 847-772-8865
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403(b) PLANS

AIG Retirement / VALIC	General phone # Kieron Inalsingh	800-448-2542 773-301-7217
Ameriprise Financial	General phone #	800-862-7919
AXA Equitable / Equitable Ins Co april.feinberg@axa-advisors.com todd.schlesinger@axa-advisors.com	General phone # April Feinberg Todd Schlesinger	800-628-6673 847-346-7953 224-554-8067
Fidelity Investments	General phone #	800-343-0860
First Investors Corp james.slater@firstinvestors.com adam.dziubinski@firstinvestors.com	General phone # James Slater Adam Dziubinski	800-423-4026 630-705-1800x227 630-705-1800
Great American Life Ins Co denise@enrichprivatewealth.com	General phone # Jesus Garcia Denise Izatt	888-497-8556 708-843-2002 630-571-6077
Horace Mann Insurance Company timothy.frahm@horacemann.com	General phone # Timothy Frahm	800-999-1030 847-323-5278
ING Retirement Plans (Northern Life) ritajohnson@yourbrokerfinancial.com glenn.dooner@lpl.com	General phone # Margherita Johnson Glenn Dooner	800-584-6001 708-460-4542 847-302-6644
Lincoln Investment Planning, Inc jjsmith@lincolninvestment.com	General phone # Jeffrey Smith, CFP	630-620-6100x5717 847-772-8865
Lincoln National Life (Lincoln Financial Grp)	General phone #	800-893-7168
MetLife Resources	General phone #	800-560-5001
Oppenheimer Funds rhartzel@sagepointadvisor.com fred.williams@edwardjones.com mark.wimmer@unitedcp.com	General phone# Richard Hartzel Fred Williams Mark Wimmer	888-470-0862 847-998-9869 847-428-6060 312-674-4873