

**New Albany Floyd County Consolidated School Corporation**

**List of Approved Tax Shelter 403(b) Companies**

<b><u>Company</u></b>	<b><u>Agent Name &amp; Number</u></b>	<b><u>Type of Account</u></b>
<b>VALIC</b>	<b>Gary Bridwell, Financial Advisor</b> 812.322.2624 Cell 800.892.5558 ext. 87042 317.818.5900 District Office	Traditional 403(b)
<b>AXA Advisors</b>	<b>Christopher Zingara</b> 732.452.7310	Traditional 403(b)
<b>Fidelity Retirement Svs.</b>	<b>800.544.6666</b>	Traditional 403(b) Plan #83173 Roth 403(b) Plan #83173
<b>First Investors Corp.</b>	<b>Noel Thompson</b> 859.273.4095 ext. 305	Traditional 403(b)
<b>Oppenheimer Funds</b>	<b>Michael Carter 812.981.8125</b> <b>Thomas Jones 812.948.9201</b> <b>Larry Ricke 812.944.4461</b> <b>Boyd Wright 812.246.6628</b> <b>Edward Jones Agents</b>	Traditional 403(b) Roth 403(b)
<b>TIAA-Cref</b>	<b>800.842.2638</b>	Traditional 403(b)

The following steps will guide you through setting up your 403(b):

1. Contact one of the companies listed above and complete the enrollment application. If you already have a financial advisor you can contact them to see if they have the ability to work with any of the listed companies.
2. Complete a Salary Reduction Agreement to begin payroll deductions. Located on the NAFCS website under Staff>Staff Group Benefits or contact Human Resources to obtain form. Return completed form to Human Resources.

**Questions?** Contact: Melissa Gream  
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