

Tax Sheltered Annuities 403(b) Traditional and Roth IRA

- a. Current annuities will continue automatically. If an employee wishes to start, terminate or change the contribution amount, the District Salary Reduction Agreement form must be submitted and approved by the District prior to any action.

- b. Carruth Compliance Consulting, Inc. is the District's compliance agent. All rules, regulations, forms and approved carriers can be obtained on its website at:
https://www.ncompliance.com/guest_employees.aspx?EmployerID=172

- c. District approved plans are:

American Fidelity Assurance Co.:

https://www.ncompliance.com/guest_vendorinfo.aspx?EmployerVendorID=9157

Horace Mann Insurance Co.:

https://www.ncompliance.com/guest_vendorinfo.aspx?EmployerVendorID=9165

Invesco:

https://www.ncompliance.com/guest_vendorinfo.aspx?EmployerVendorID=9176

If you have any questions, please contact Don Staehely, Business Manager, at
don.staehely@alsea.k12.or.us.