



Knox County Schools 403b Vendor List Revised November 2015

Knox County Schools' (KCS) employees may elect to participate in tax sheltered annuity programs. The following companies have payroll slots and have complied with the tax sheltered annuity regulation that require the number of actively participating contracts to not fall below 50 on the billing cycle for April of any year. Employees wishing to participate in a tax shelter annuity program must complete the Tax Shelter Payroll Deduction/Change Authorization form. These forms are available from the Employee Benefits office, on the KCS intranet forms online database (Form #BO-121), or on the KCS website at knoxschools.org (select "Departments" then "Benefits & Employee Relations" then "Tax Shelter"). All copies of the form must be completed by the employee and sent to the Employee Benefits Department. Approved agents should also have forms available. All forms must be submitted by the 5th of each month from September through June, in order to be effective for the designated payroll. When an employee wishes to make a change in the amount being withheld, the employee *must* submit a new form with the corrected amount. For additional information or assistance, please call 865-594-1686.

Deduction #	403b Company	Agent(s)
401	Voya Retirement Insurance & Annuity Co. VRIAC P. O. Box 5060 Minot, ND 58702-5060	William Rutter 226 Sandringham Court Knoxville, TN 37934 865-599-0344 (phone) 865-966-9453 (fax) william.rutter@voyafa.com
407 408 409 410 411 412	AIG American General Great American Life Insurance FTJ Fund Choice (TD Ameritrade Trust Co.) Oppenheimer Funds Pacific Life Security Benefit	Andrea Carpenter U. S. Bancorp Investments, Inc. 417 Foothills Mall Drive Maryville, TN 37804 865-980-2930 (office) 865-414-0753 (cell) 865-980-2921 (fax) andrea.carpenter@usbank.com



409 410 412	FTJ Fund Choice (TD Ameritrade Trust Co.) Oppenheimer Funds Security Benefit	Vernon T. Henry VTH Concierge Financial Planning 325 Huxley Road Knoxville, TN 37922 865-940-0278 (phone) 865-940-0278 (fax) vhenry@gwnsecurities.com
421	ING Reliastar Life Insurance Co.	Gary B. Holt & Associates 419 Forest Boulevard Knoxville, TN 37919 865-558-9005 (phone) 865-584-6865 (fax)
428 428 428	VALIC - Matt Prince VALIC - Andrew Craft VALIC - Nelson Brittain	matt.prince@valic.com 865-291-5131 (phone) 865-291-5139 (fax) andrew.craft@valic.com 865-291-5130 (phone) 865-329-7434 (fax) nelson.brittain@valic.com 865-375-9651 (phone) 865-291-5139 (fax)
	Customer Service 1-800-448-2542	
434	National Life Group (formerly Life of the SW/ValuTeachers)	Bentley Christopher 770-683-8300 Linda Green 865-377-42473 Bo Haynes 770-853-3393 Brandy Jerrell 865-320-8240 Jared Johnson 770-712-5846 Curt Moore 865-356-4890 Cinda Skelton 404-219-2807