



## Knox County Schools 403b Vendor List Revised November 2019

Knox County Schools' (KCS) employees may elect to participate in tax sheltered account programs. The following companies have payroll slots and have complied with the tax sheltered account regulations 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 account 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 [www.knoxschools.org/benefits](http://www.knoxschools.org/benefits). 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 5<sup>th</sup> 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 865-594-1685.

Deduction #	403b Company	Agent(s)
7309	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) <a href="mailto:william.rutter@voyafa.com">william.rutter@voyafa.com</a>
7300 7302 7301 7304 7305 7307	AIG American General Great American Life Insurance TD Ameritrade Trust (Orion Portfolio Solutions, LLC - formerly FTJ FundChoice) 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) <a href="mailto:andrea.carpenter@usbank.com">andrea.carpenter@usbank.com</a>



<p>7301 7304 7307</p>	<p>TD Ameritrade Trust (Orion Portfolio Solutions, LLC - formerly FTJ FundChoice) Oppenheimer Funds Security Benefit</p>	<p>Vernon J. Henry VJH Concierge Financial Planning 325 Huxley Road Knoxville, TN 37922 865-940-0278 (phone) 1-888-356-9219 (fax) <a href="mailto:vjhenry@tds.net">vjhenry@tds.net</a></p>
<p>7306</p>	<p>ING Reliastar Life Insurance Co.  <a href="mailto:gbhinv@bellsouth.net">gbhinv@bellsouth.net</a></p>	<p>Gary B. Holt &amp; Associates 419 Forest Boulevard Knoxville, TN 37919 865-558-9005 (phone) 865-584-6865 (fax)</p>
<p>7308  7308  7308</p>	<p>VALIC - Heather Brittain  VALIC - Andrew Craft  VALIC - Nelson Brittain  Customer Service 1-800-448-2542</p>	<p><a href="mailto:heather.brittain@valic.com">heather.brittain@valic.com</a> 865-291-5139 (fax)  <a href="mailto:andrew.craft@valic.com">andrew.craft@valic.com</a> 865-291-5130 (phone) 865-329-7434 (fax) <a href="mailto:nelson.brittain@valic.com">nelson.brittain@valic.com</a> 865-375-9651 (phone) 865-291-5139 (fax)</p>
<p>7303</p>	<p>National Life Group (formerly Life of the SW/ValuTeachers)  1-800-732-8939</p>	<p>Bentley Christopher 770-683-8300 Brandy Jerrell 865-320-8240 Julia Whipple 865-556-2157 Sandra Rowcliffe 865-603-5851 Amy Plumlee 865-591-1257</p>