

Spring Valley School District

MEMO

**S1450 County Road CC
Spring Valley WI 54767
Phone (715)778-5551
Fax (715)778-4761**

From: Sandy Langer-Wood
District Accountant

Re: School District of Spring Valley 403(b) Tax Sheltered Annuity (TSA) Plan

Attached is information regarding the District's 403(b) Plan.

You will find the Summary Plan Description, which includes the authorized vendors, and a Salary Reduction Agreement. The current authorized vendors are:

WEA TSA Trust: Bruce Winchester, WEA Member Benefits
bwinchester@weabenefits.com
Direct: 608-416-8682

Aspire Financial: Contact an Edward Jones Financial Advisor. Advisors used by your fellow staff members:

Kurtis Brown
kurtis.brown@edwardjones.com
Direct: 715-235-3884

Joel Helminiak
joel.helminiak@edwardjones.com
Direct: 715-309-4811

Horace Mann: Richard (Dick) Krueger
richard.krueger@horacemann.com
Direct: 715-877-2788

Riversource (Ameriprise): Customer Service
1-800-297-2012
Monday – Friday, 8 AM – 6 PM

Thrivent Financial: Financial Guidance Team
1-888-834-7437 or
Joan Bartz, Financial Consultant
joan.bartz@thrivent.com
Direct: 715-265-4453

If you are interested in participating in the District's 403(b) TSA Plan, please read the Summary Plan Description, complete the Salary Reduction Agreement, and return it to the District Office.

Deductions from your paycheck will fund the 403(b) TSA component on a pre-tax basis and the 403(b) TSA Roth component on an after-tax basis.

Please contact Cristy Peavey or myself with any questions.