St. Louis Park Public Schools

# 403(b) & 457 Annuity Contribution Form

**EMPLOYEE NAME:** ____________________________________________________________

***PLEASE NOTE:*** *Employee must contact the vendor directly to set-up an account prior to requesting payroll deductions (Please see Annuity Vendor Contact list)*

**SELECTED ANNUITY VENDOR:**

- ☐ Ameriprise Financial
- ☐ Corebridge Financial/Financial Advisors, Inc.
- ☐ Empower 403(b)
- ☐ Empower 403 (b) - Roth
- ☐ Equitable
- ☐ Equitable - Roth
- ☐ Fidelity Retirement Services
- ☐ MEA/ESI Educator Financial Assurance
- ☐ MN State Deferred Comp 457
- ☐ MN State Deferred Comp 457 - Roth
- ☐ Vanguard Group
- ☐ Vanguard Group – Roth

*Note: the district has traditional and Roth 403(b) options available to select for enrollment. If you want to make a change to a former plan that is not listed above, please write the name of the plan in on the line below and work directly with payroll on processing this change.

**Former Vendor:** ___________________________________________

**CHECK THE BOX THAT APPLIES:**

- ☐ New Enrollment Account Confirmation #________________________
- ☐ Contribution Change
- ☐ Cancellation

**EFFECTIVE WITH THE SALARY PAID ON (OR SOON THEREAFTER):**__________________________**(DATE)**

**PER PAY PERIOD DEDUCTION ($ or % of Salary):**_________or **ANNUAL ELECTION ($ or % of Salary):** _________

***Note:*** *For groups with % matching in your contract, a $ amount listed will be converted to % of salary and be entered for you. District matches can only be applied to one 403(b) or 457 plan at a time.*

***Catch-up limits are available if you are age 50 or older. Ask your annuity provider for applicable information***

- ☐ Yes, I am using catch up provisions
- ☐ No, catch up is not applicable

It is understood that I may be asked to provide St. Louis Park Schools with a calculation computed by my Annuity provider that supports my annual contributions limits. It is also understood that the undersigned employee certifies the liability for any tax deficiency that may result from an improper application of the exclusion as defined by Federal and State Statutes including annual limitations as to the amount of exclusion allowances

**EMPLOYEE SIGNATURE:**___________________________________________**DATE:** _______________

**For Payroll's Use:**

Contract: _________ Years of Service: ______ Eligible Match: ___________TSA: ______Deferred Comp: ______ Both:_______

**Annuity Vendor Contact List**

| | |
|---|---|
| **Ameriprise Financial**<br>3600 Minnesota Drive – Suite 550<br>Edina, MN 55435<br>Group # 113262<br>Phone: (952) 300-2325<br>https://www.ameripriseadvisors.com/ | **Fidelity Retirement Services**<br>PO Box 770001<br>Cincinnati, OH 45277-0050<br>Plan ID# 51772<br>Phone: 1-800-343-0860<br>www.netbenefits.com/ready2enroll |
| **Corebridge Financial/Financial Advisors, Inc.**<br>7650 Edinborough Way – Suite 320<br>Edina, MN 55435<br>Plan ID # 40368<br>CF Phone: 1-800-448-2542 or Phone: (952) 838-7800 | **MEA/ESI Educators Financial Assurance**<br>P.O. Box 428<br>Cambridge, MN 55008<br>Phone: (952) 941-9140<br>Fax: (952) 941-9141 |
| **Empower**<br>319 Barry Ave. S. #200<br>Wayzata, MN 55391<br>Plan ID # 85094-01<br>Phone: (952) 955-8216<br>Traditional 403(b) and ROTH options | **Minnesota State Deferred Compensation**<br>395 John Ireland Blvd.<br>St. Paul, MN 55101-9799<br>Group# 98995-01<br>Phone: 1-800-657-5757 |
| **Equitable**<br>2 Meridian Crossings – Suite 450<br>Minneapolis, MN 55423<br>Plan ID # 009219<br>Phone: (612) 243-3230 | **Vanguard Group**<br>PO Box 1110<br>Valley Forge, PA 19482-1110<br>Plan ID # 10071496<br>Phone: (800) 962-5068<br>www.support.vanguard.com |

**Aviben: To Transfer/Cash out 403(b) Funds-**

403(b) providers require the "plan administrator" to sign off and approve the transfer of the funds in your 403(b) account to another retirement account. If you are trying to move your 403(b) plan dollars and are required to have the plan administrator for SLP 403(b) plans sign off, you will need to send that form to AVIBEN.

Phone: (763) 552-6053
Email: claimsupport@aviben.com
Website: www.aviben.com