

ROCKINGHAM COUNTY SCHOOLS APPROVED TAX SHELTERED OPTIONS

These companies have been approved to sell their products in our school system; however, we do not endorse any of these products.

Forms to enroll, change or stop deductions must be received in the Finance Department no later than the 15th of the month that you want the requested action to be effective. You must use Rockingham County Schools Salary Redirection Agreement for 403(b)/ 457 Plans.

AMERIPRISE FINANCIAL SERVICES

AGENT INFO: Curtis Casey (336-427-6610) or (1-800-862-7919)
PRODUCTS: River Source Retirement Advisor #4 Access Variable Annuity

IDS 403B

HORACE MANN

AGENT INFO: Jeremy Strader, (336-378-1772)
PRODUCTS: Group Fixed Annuity, Group Variable Annuity

HOR 403B
HOR457 457B

ING

AGENT INFO: Robinson Associates only: (1-800-433-4032) Agent: Larry Poole (704-982-6700) or (704-774-1452)
or Don & Craig Daves (1-888-835-3854) or (919-479-2084)
PRODUCTS: ING Custom Choice Voluntary TDA

ING403 403B

LIFE INSURANCE CO. OF THE SOUTHWEST

AGENT INFO: Robinson Associates only: (1-800-433-4032): Agent: Larry Poole (704-982-6700) or (704-774-1452)
PRODUCTS: SecurePlus Silver, RetireMax FPDA1

LSW 403B

LINCOLN INVESTMENT PLANNING

AGENT INFO: Robinson Associates only: (1-800-433-4032): Agent: Larry Poole: (704-982-6700) or (704-774-1452)
PRODUCTS: Retirement Solutions Premier, Retirement Solutions

LIP403 403B
LIP457 457B
LIROTH 403B Roth
LI457R 457B Roth

ASPIRE FINANCIAL SERVICES

AGENT INFO: Edward Jones Associates only: (1-866-634-5873) Agent: Sam Phillips (1-336-627-7737)
PRODUCTS: Traditional 403(b)/457(b) and Roth 403(b)/457(b)

ASP403 403B
ASP457 457B
AS403R 403B Roth
AS457R 457B Roth

Call **Prudential** at 1-866-627-5267 for enrollment, change, and cancellation information on the following:

401(k) SUPPLEMENTAL RETIREMENT PLAN
401(k) ROTH
NC403 STATE 403(b) plan
NC457 STATE 457 plan

PLANS UNDER THESE COMPANIES ARE GRANDFATHERED. NO NEW DEDUCTIONS ALLOWED.

ING457
AIG VALIC (AIG)
SECURITY BENEFIT LIFE INS CO (NEA & 457SEC)
AMERICAN UNITED LIFE INS. CO. (TRAM)
PAUL REVERE INSURANCE GROUP (PREV)
GREAT AMERICAN LIFE INSURANCE CO