

Defined Contribution Retirement Plans 403 (b) & 457 VENDOR LISTING

APPROVED Vendors

The following 403(b) vendors have signed information sharing agreements and hold harmless agreements with SMCCCD and are approved vendors under the new IRS 403(b) regulations effective January 1, 2009. New enrollment, payroll contributions, transfers/exchanges to and from the vendors are accepted. Loans and withdrawals are obtainable if vendor allows for them.

PAYROLL DEDUCTION CODE	VENDOR	LOANS/HARDSHI P	CONTACT NUMBER
AST	CalSTRS Pension II Program (VOYA Financial)– 403(b) Plan	Loans & hardship	(415) 882-3667
A60	CalSTRS Pension II Program (VOYA Financial)– 457 Plan	Loans & Hardship	(888) 394-2060
AFS	FIDELITY SERVICE COMPANY	Loans & Hardship	(800) 328-6608
AFT	FRANKLIN TEMPLETON Bank & Trust, FSB	Hardship	(800) 527-2020
AGA	GREAT AMERICAN FINANCIAL RESOURCES, INC. (Formerly Galic Disbursing Company)	Loans & hardship	(800) 789-6771
R57	EMPOWER (formerly Mass Mutual) 457 Plan	Loans & hardship	(650) 583-8815
ALS	LIFE INSURANCE OF THE SOUTHWEST	Loans & hardship	(800) 579-2878
AIR	METROPOLITAN LIFE INSURANCE COMPANY (METLIFE)	Loans & hardship	(650) 274-1756
AVA/ A57	COREBRIDGE FINANCIAL (formerly VALIC) 403(b) & 457 Plan	Loans & hardship	(650) 922-2031

**The District does not endorse or assume any responsibility for these vendors.
Consult your own tax advisor or representative of these vendors if you are interested in a TSA program.**

Before you stop your contributions, read this!

If you currently contribute to a 403(b) vendor that is not registered on the 403bCompare.com Web site or if you are planning on changing employers, you should not stop your contributions until you've read California Education Code, section 25113.

25113 A local school district, community college district, or county office of education may not forward annuity or custodial account consideration to the vendor of any unregistered 403(b) product, except insofar as an employee continues making contributions to an unregistered product or products purchased or entered into prior to the implementation date of the impartial investment bank, as established by this chapter.

It is highly possible that once you stop your current contributions, you may not be able to start contributing to that same vendor if they are not on the 403bCompare.com Web site. You may also lose the ability to contribute to the same vendor if you change employers and your new employer does not have that vendor on their approved vendor list. Therefore, you should make every effort to verify this information and make appropriate changes based on your discovery. Please speak to your payroll or 403(b) representative regarding their administrative process in regards to this procedure.