

Approved Provider List*

403(b) Provider Names

Below is a list of approved providers for the districts/schools that Schools First Plan Administration serves as third party administrator. All providers are registered with CalSTRS 403(b) Compare and have entered into an information sharing agreement with SchoolsFirst Plan Administration. More information regarding each provider is available by visiting www.403bcompare.com. The list of providers is subject to change.

American Century Investment **Pre-tax & Roth**

American Fidelity Assurance Company **Pre-tax Only & Roth**

American Funds Distributors, Inc. (AFD) (District Specific) **Pre-tax Only & Roth**

American United Life (One America) (Existing policies only) **Pre-tax Only & Roth**

Americo Financial Life and Annuity Insurance Company/Great Southern Life Insurance Company **Pre-tax & Roth**

Ameriprise **Pre-tax Only & Roth**

Aspire **Pre-tax & Roth**

Aspire-IPX **Pre-tax & Roth**

Brighthouse (formerly part of Metropolitan Insurance Co.) **Pre-tax & Roth**

CalSTRS Pension 2 **Pre-tax & Roth**

Corebridge Financial (formerly AIG Retirement Services/VALIC) **Pre-tax & Roth**

CTA Voluntary Retirement Plans for Educators, LLC **Pre-tax & Roth**

Equitable Life Insurance Company **Pre-tax & Roth**

Fidelity Investments (District Specific) **Pre-tax & Roth**

Fiduciary Trust Company of New Hampshire (formerly Ivy) **Pre-tax & Roth**

Franklin Templeton Investments **Pre-tax & Roth**

Great American (Annuity Investors Life) (No New Accounts) **Pre-tax Only & Roth**

GWN Securities, Inc. **Pre-tax & Roth**

Horace Mann Investors, Inc. **Pre-tax & Roth**

Horace Mann Life Insurance Company **Pre-tax & Roth**

Industrial-Alliance Pacific Life Ins Co, US Branch. **Pre-tax & Roth**

Invesco (formerly Oppenheimer Funds) **Pre-tax & Roth**

Lincoln Financial Group (Lincoln National Life) **Pre-tax & Roth**

Lincoln Investment, LLC **Pre-tax & Roth**

MassMutual (Existing policies only) **Pre-Tax Only**

Matrix Trust Co. (formerly PenServ/Foresters Financial) **Pre-tax & Roth**

Metropolitan Life Insurance Co. **Pre-tax & Roth**

Midland National **Pre-tax & Roth**

Modern Woodman of America **Pre-tax & Roth**

National Life Group (Life Insurance Company of the Southwest) **Pre-tax & Roth**

New York Life Insurance & Annuity Corp. **Pre-tax & Roth**

North American Company for Life and Health **Pre-tax & Roth**

Orion Portfolio Solutions (formerly FTJ FundChoice, LLC) **Pre-tax & Roth**

Pacific Life Insurance Company **Pre-Tax Only**

PFS Investments Inc. **Pre-tax & Roth**

PlanMember Securities Corp. **Pre-tax & Roth**

SchoolsFirst FCU (Retirement Builder Plan through Nationwide) **Pre-tax & Roth**

Security Benefit Group **Pre-tax & Roth**

Thrivent Financial **Pre-tax & Roth**

Transamerica Life Insurance Company (existing policies only) **Pre-tax & Roth**

USAA Life Insurance Company **Pre-Tax Only**

Vanguard Group **Pre-tax & Roth**

Victory Capital Management **Pre-tax & Roth**

Voya Reliastar Life Insurance Company **Pre-tax & Roth**

Voya Retirement Insurance and Annuity Company **Pre-tax & Roth**

457(b) Provider Names

SchoolsFirst FCU (Retirement Builder Plan through Nationwide) **Pre-tax & Roth**

SchoolsFirst FCU Fixed 457(b) Share Certificate

Fidelity Investments (District Specific) **Pre-tax & Roth**

CalSTRS Pension 2 (District Specific) **Pre-tax & Roth**

Security Benefit (Existing District Plans Only) **Pre-tax & Roth**

For more information, please contact SchoolsFirst Plan Administration



Call 800.462.8328, ext. 4727



Click www.schoolsfirstfcu.org



Email tpa@schoolsfirstfcu.org

* This list is subject to change.

** Not available in all districts. Please confirm availability with SchoolsFirst Plan Administration