

### **TAX SHELTERED ANNUITY PROGRAM**

The Tax Sheltered Annuity Program will continue the same as last year unless you wish to make a change in the amount withheld or wish to discontinue your program. The Tax Reform Act of 1986 provides for limited changes in contributions during the year. If a change in monthly deposits is necessary, it should be made in January. Please remember – if you have an address change, name change or beneficiary change, if applicable, it is the responsibility of the employee to notify the company of the change.

1. **To make a change in the amount withheld** – Contact your company representative to inform them of the change and complete the proper paperwork. Contact Angela Wolfe in the business office, a signed authorization is required. Note: Changes to Teachers’ Retirement Annuity Programs – Contact Angela Wolfe in the business office at 255-0686.
2. **To discontinue your program** – Contact your company representative to inform them and complete the proper paperwork. Contact Angela Wolfe in the business office, a signed authorization is required.
3. **To begin a program** – Contact the agent of the eligible company. The agent will work out a program for you and notify the business office. A signed authorization is required. Note: To begin a program with Teachers’ Retirement, contact Angela Wolfe business office at 255-0686.
4. **Companies with approved Annuity Programs:**

<u>COMPANY NAME</u>	<u>REPRESENTATIVE</u>	<u>PHONE NUMBER</u>
403(B) ASP	James Olson	1-813-874-0671
American Fidelity Assurance	Cherie Horsfall	1-800-662-1106
Ameriprise Financial Services	Dave Ford	1-612-671-5704
AXA Equitable Life Insurance Company	Renea Dumas	1-315-477-3570
Horace Mann Life Insurance Company	Tricia Seifert	1-866-999-1945
Life Insurance Company of the Southwest	Plan Admin Unit	1-200-579-2878
Modern Woodmen of America	Debra Henderson	1-309-793-5689
Security Benefit	Susan Cain	1-888-724-7526
Teachers’ Retirement System of Oklahoma	Dixie Moody	1-405-521-4742

5. Any other company may offer an annuity program by meeting the criteria of the Board of Education Policy governing payroll deductions for annuities.