

# GRANTS PASS 403(B) VENDORS

403(b) PLAN AT-A-GLANCE  
403(b) Information  
403(b) List of Vendors  
403(b) Plan Document  
Solicitation Rules  
457(b) Information

ELIGIBILITY & LIMITS  
403(b) Enrollment Procedures  
403(b) Salary Reduction Agreement  
403(b) Frequently Asked Questions

FINRA's Broker Check provides background information, registration status, and more on a potential financial advisor. Additional information may be available through the Oregon's Insurance Resource Page or the Washington State Consumer Tool about insurance product providers and/or advisors. Our Choosing an Investment page has additional information to help you evaluate your investment options.

A comparison grid is available to help evaluate and compare the Active Payroll Slot Vendors options in the Grants Pass 403(b) Plan. Additional information concerning available fee and performance information is linked below the vendor name in the list of Active Payroll Slots.

The 403bCompare web site is an information bank of free objective information about 403(b) vendors and the products they offer. While the primary focus is for employees of California school districts it is a useful resource for 403(b) plan participants in other states as well.

*Please note: Exchanges, Transfers, and Rollovers into the plan are only allowed to Active or Inactive Payroll Slot Vendors.*

## 403(B) TSA VENDORS WITH ACTIVE PAYROLL SLOTS

Employees of Grants Pass are eligible to establish an account with, and contribute to, the following Vendors:

- **Corebridge Financial (formerly AIG Retirement, VALIC)** Plan ID# 01167 (Roth 403(b) accounts available\*)
  - Fee and Performance Resources: [✓Fees CCC Summary](#) [✓Fees Page on Vendor's Website](#) [✓Prospectuses](#) [✓Performance](#) [✓Online Enrollment Link](#) [✓More info](#)
    - Paul Gerlick - 541-499-1460 email: paul.gerlick@corebridgefinancial.com
- **Equitable (AXA Equitable Life Insurance Company)** Plan ID# 818288 (Roth 403(b) accounts available\*)
  - Fee and Performance Resources: [✓Fees CCC Summary](#) [✓Online Enrollment Link](#) [✓More info](#)
    - Lauren Smith, VP, CRES - 503 243-4328 email: Lauren.smith@equitable.com
- **Franklin Templeton** Plan ID# 53562,46477
  - Fee and Performance Resources: [✓Fees Page on Vendor's Website](#) [✓Prospectuses](#) [✓Enrollment Form](#) [✓More info](#)
- **Horace Mann Insurance Company** Plan ID# 36258 - I0117010701 (Roth 403(b) accounts available\*)
  - Fee and Performance Resources: [✓Prospectuses](#) [✓More info](#)
    - 403(b) Customer Service (Participants and Plan Sponsors) - 800-999-1030
- **Invesco** Plan ID# 64095 (Roth 403(b) accounts available\*)
  - Fee and Performance Resources: [✓Prospectuses](#) [✓More info](#)
    - Retirement Services OppenheimerFunds - (800) 835-7305
- **MetLife** Plan ID# To Be Determined (Roth 403(b) accounts available\*)
  - Fee and Performance Resources: [✓Prospectuses](#) [✓More info](#)
    - Jacqueline Kaiser - 714-425-1920 email: jkaiser2@metlife.com
- **New York Life** Plan ID# 92050, T10637001 Note: No employer contributions are allowed to this vendor.
  - Fee and Performance Resources: [✓More info](#)
- **Penselect/ Foresters Financial** Plan ID# B250034 (Roth 403(b) accounts available\*)
  - Fee and Performance Resources: [✓Fees CCC Summary](#) [✓More info](#)
    - Robert Krage - 503 296-7676 x312 email: robert.krage@ceterais.com
    - Trevor Parker - (503) 296-7676 ext. 237 email: trevor.parker@ceterais.com
- **ReliaStar Life Insurance Company** Plan ID# CZ46 (Roth 403(b) accounts available\*)

- *Fee and Performance Resources:* [✓Prospectuses](#) [✓Performance](#) [✓ More info](#)
  - **Magen Fong** - 541 734-9833 email: [Mfong@voyafa.com](mailto:Mfong@voyafa.com)
- **Thrivent Financial (Annuities)** Plan ID# 514753468
- *Fee and Performance Resources:* [✓Performance](#) [✓ More info](#)
  - **403(b) Financial Advice Center (Participants and Plan Sponsors)** - 1-800-847-4836
  - **Jason Burley** - 541 474-0824 email: [Jason.Burley@Thrivent.com](mailto:Jason.Burley@Thrivent.com)
- **Thrivent Financial Mutual Funds** Plan ID# 514753468
- *Fee and Performance Resources:* [✓Performance](#) [✓ More info](#)
  - **Jason Burley** - 541 474-0824 email: [Jason.Burley@Thrivent.com](mailto:Jason.Burley@Thrivent.com)
- **The Vanguard Group** Plan ID# 428817 (Roth 403(b) accounts available\*)
- *Fee and Performance Resources:* [✓Fees CCC Summary](#) [✓Fees Page on Vendor's Website](#) [✓Prospectuses](#) [✓Online Enrollment Link](#) [✓Enrollment Form](#) [✓ More info](#)
  - **403(b) Customer Service For Participants** - 1-800-569-4903 website: <https://investor.vanguard.com/403b-plans/>
- **Voya Retirement Insurance and Annuity Company (VRIAC)** Plan ID# VT8505 (Roth 403(b) accounts available\*)
- *Fee and Performance Resources:* [✓Fees CCC Summary](#) [✓Prospectuses](#) [✓Performance](#) [✓Online Enrollment Link](#) [✓ More info](#)
  - **Magen Fong** - 541 734-9833 email: [Mfong@voyafa.com](mailto:Mfong@voyafa.com)

*\*To defer **Roth** (after-tax) contributions, it may be necessary to open a separate designated Roth 403(b) account, even if you have an existing Pre-tax 403(b) account. Contact your vendor or representative to make sure your account is properly set-up to receive Roth 403(b) contributions. The availability of certain account types may be subject to change and/or vendor restrictions.*

Click here for a Printer-Friendly PDF of this 403(b) Vendor Page.

## 403(B) TSA VENDORS WITH INACTIVE PAYROLL SLOTS

Employees of Grants Pass already contributing to the Vendors below may continue to do so. However, additional employees are not allowed at this time.

- Scudder Investments/ DWS
- American Century Investments, Inc.
- American United Life Insurance Company (OneAmerica)
- FTC (formerly Waddell & Reed/ Ivy Funds)
- Jackson National
- MassMutual Financial Group
- MassMutual Ascend (Formerly Great American)
- Putnam Investments
- Standard Insurance Company
- Symetra Financial
- USAA Life Insurance Company
- End of List

## ADDITIONAL VENDORS ASSOCIATED WITH THE PLAN

- *Vendors Historically Associated with the Grants Pass 403(b) Plan*