Newberg 403(b) Vendors with Active Payroll Slots

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

- **American Fidelity Assurance Company** Plan ID# 65325
- **American Funds Distributors, Inc** Plan ID# 65171
  - **Alexandra Bechtold (Edward Jones) -** 503-538-1161 *email:Alexandra.bechtold@edwardjones.com website:http://www.edwardjones.com/alexandra-bechtold*
  - **American Funds 403(b) Customer Service -** 800-421-4225 *website:https://www.americanfunds.com/individual/service-and-support/advisor-locator.html*
  - **Branden Buel (Edward Jones) -** 541-386-1655 *email:branden.buel@edwardjones.com*
  - **Heath Cornick (Edward Jones) -** (503) 538-1161 *email:heath.cornick@edwardjones.com*
  - **Jennifer (Willamette Financial Group) Blake, CFP, ChFC, CMFC -** 503-554-9878 *email:jennifer@wfgadvisors.com*
  - **Jerald Lyda (Lyda Financial) -** 503-538-1900 *email:jerald.lyda@lpl.com*
  - **Mike Boock (Edward Jones Investments) -** 503-538-8781 *email:mike.boock@edwardjones.com*
  - **Scott Winter -** 971-832-8418 *email:scott.winter@lpl.com*
  - **Timothy Mayfield (Grace Investors) -** 503-404-2444 *email:timothy.mayfield@lpl.com website:http://www.graceinv.com/*
  - **Trevor Hoskinson (Edward Jones) -** 503-538-1162 *email:trevor.hoskinson@edwardjones.com*
- **Equitable (AXA Equitable Life Insurance Company)** Plan ID# 814102 *(Roth 403(b) accounts available*)*
  - **Lauren Smith, VP, CRES -** 503 243-4328 *email:Lauren.smith@equitable.com*
- **Fidelity Investments** Plan ID# 95433 *(Roth 403(b) accounts available*)*
  - **403(b) Customer Service (Participants and Plan Sponsors) -** 800-343-0860 *website:http://www.403b.com*
- **Penselect/ Foresters Financial** Plan ID# A250040 *(Roth 403(b) accounts available*)*
  - **Robert Krage -** 503 296-7676 x312 *email:robert.krage@ceterais.com*
  - **Trevor Parker -** (503) 296-7676 ext. 237 *email:trevor.parker@ceterais.com*
- **PlanMember Services Corporation** Plan ID# 803007409 *(Roth 403(b) accounts available*)*
  - **PlanMember Services Customer Service -** 1-800-874-6910
- **Voya Retirement Insurance and Annuity Company (VRIAC)** Plan ID# VT4870 (Verification code for online enrollment: 045886) *(Roth 403(b) accounts available*)*
  - **Pam Young -** 503-257-4637 *email:pamela.young@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.*

For detailed information concerning the Newberg 403(b) Plan (including links to the profiles on local contacts, vendor websites, vendor online account establishment, fee and performance information, and the enrollment steps for Newberg's 403(b) Plan) please visit Carruth Compliance Consulting's website: www.ncompliance.com. Please contact CCC with any questions at 503-968-8961 or Toll-Free at 877-222-3090 or via the "Contact Us" page.