



**TALENT DEVELOPMENT AND HUMAN RESOURCES -OFFICE OF BENEFITS ADMINISTRATION**  
Administrative Services Building, Room 140, Akron, OH 44325-0602  
Phone: 330-972-7092 ♦ Fax: 330-972-2336 ♦ [www.uakron.edu/hr/benefits](http://www.uakron.edu/hr/benefits)

## Exploring Investment Options

### **Why Should I Invest?**

The University of Akron offers excellent retirement plans with OPERS, SERS, STRS and ARP; however it does not replace your full salary. Investing now will help you supplement the difference throughout your retirement years.

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### **What is a Tax Sheltered Annuity?**

TSAAs, such as the 403(b) and 457(b), are supplemental retirement plans available to employees of educational institutions and certain non-profit organizations. Contributions to these plans are made on a *pre-tax basis* which can greatly *reduce your taxable income*. In addition, all dividends, interest and capital gains accumulate on a tax-deferred basis.

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### **Educational Seminars**

Retirement planning seminars are provided by The Talent Development and Human Resources Department. We encourage you to take advantage of these learning opportunities. Current seminars can be found at <https://www.uakron.edu/seminars/>.

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### **Plan Administration Services**

Administrative services for the 403(b) plan are provided by TSA Consulting Group, Inc. They can be reached by phone at (888) 796-3786 x2 or by email at [recordkeeping@tsacg.com](mailto:recordkeeping@tsacg.com) or by mail at Participants Transaction Department, 28 Ferry Rd SE, Fort Walton Beach, FL 32548.

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### **Salary Reduction Agreement**

<http://www.uakron.edu/hr/benefits/supplemental-retirement-accounts.dot>

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### **Provider List**

Following is a list of providers available to you. The University of Akron cannot endorse a particular provider. They are listed in alphabetical order with no emphasis on merit. Options available for each vendor are marked accordingly.

| Program Contact Information  | Broker | 403(b) | 403(b) Roth | 457 | State Plan | ARP |
|--|--------|--------|-------------|-----|------------|-----|
| <b>Ameriprise Financial Inc.</b> ♦ Nancy Flogge ♦ (330) 650-2550 ♦ <a href="mailto:Nancy.a.flogge@ampf.com">Nancy.a.flogge@ampf.com</a>  |        | X      |             |     |            |     |
| <b>AXA Equitable Advisors</b> ♦ Michael Peterson ♦ (330) 664-1829 ♦ <a href="mailto:Michael.peterson2@axa-advisors.com">Michael.peterson2@axa-advisors.com</a> ♦ <a href="http://www.axaadvisors.com">www.axaadvisors.com</a>  | X      | X      | X           |     |            | X   |
| <b>D &amp; E Financial Services</b> (FTJ Fund Choice, Great American Life Insurance Co. (GALIC), Life Ins. Co. of Southwest, ING(Reliastar), Midland National and Nationwide Life Insurance Co.) ♦ (330) 434-0344 ♦ <a href="mailto:Dick.Bonnell@definancial.net">Dick.Bonnell@definancial.net</a> ♦ <a href="mailto:Dave.Brown@definancial.net">Dave.Brown@definancial.net</a> ♦ <a href="mailto:Bryan.Hummel@definancial.net">Bryan.Hummel@definancial.net</a> ♦ <a href="mailto:Ron.Scalera@definancial.net">Ron.Scalera@definancial.net</a> ♦ <a href="http://www.definancial.net">www.definancial.net</a> | X      | X      | X           | X   |            | X   |
| <b>ING Financial Services</b> (ING Life Insurance and Annuity Company) ♦ Joyce Browning (216) 447-3753 ♦ <a href="mailto:Joyce.Browning@ingfp.com">Joyce.Browning@ingfp.com</a> ♦ David Cushing (216) 447-3754 ♦ <a href="mailto:David.Cushing@ingfp.com">David.Cushing@ingfp.com</a> ♦ Michelle Glass ♦ <a href="http://www.ingretirementplans.com">www.ingretirementplans.com</a>  |        | X      | X           | X   |            | X   |
| <b>Lincoln National Life</b> ♦ Lincoln Financial Group ♦ Ronald Ross ♦ (877) 929-8393 ♦ <a href="mailto:Ronald.Ross@lfg.com">Ronald.Ross@lfg.com</a> ♦ <a href="http://www.lfg.com">www.lfg.com</a>  |        | X      | X           |     |            | X   |
| <b>Massachusetts Mutual</b> ♦ Nori Dettling ♦ (330) 869-9005 ♦ (330) 820-2024  |        | X      | X           |     |            |     |
| <b>MetLife Insurance</b> ♦ Alexandra Paul ♦ (330) 666-7029 ♦ <a href="mailto:apaul2@metlife.com">apaul2@metlife.com</a> ♦ Group # 0827455  |        | X      |             |     |            |     |
| <b>Midwest Annuity &amp; Investment Co.</b> ♦ Gregory Mayernik ♦ Michael Mandrella ♦ (800) 367-4153 ♦ <a href="mailto:gmayernik@msn.com">gmayernik@msn.com</a>   | X      | X      |             |     |            |     |
| <b>Milestone Center</b> (Midland National) ♦ Dee Siegfert ♦ Christopher Miller ♦ Kathleen Kostelnik ♦ (330) 644-0284 ♦ (877) 274-7364 ♦ <a href="mailto:dee@themilestonecenter.com">dee@themilestonecenter.com</a>   | X      | X      |             |     |            |     |
| <b>Ohio Deferred Comp (ODC)</b> ♦ Service Center ♦ (877) 644-6457 ♦ <a href="http://www.ohiodc.org">www.ohiodc.org</a>   |        |        |             | X   |            |     |
| <b>Ohio Public Employees Retirement System (OPERS)</b> ♦ (800) 222-7377 ♦ <a href="mailto:benefitquestions@opers.org">benefitquestions@opers.org</a> ♦ <a href="http://www.opers.org">www.opers.org</a>  |        |        |             |     | X          |     |
| <b>PFS Investments (PRIMERICA)</b> ♦ Ketan Parekh (330) 836-6555 ♦ (330) 958-1848 ♦ (330) 548-3406 ♦ <a href="mailto:kparekh@primerica.com">kparekh@primerica.com</a> ♦ Carl Ulich (330) 346-0351 ♦ Cathy McReynolds (330) 573-8082  |        | X      | X           |     |            |     |
| <b>School Employees Retirement System (SERS)</b> ♦ (866) 280-7377 ♦ <a href="http://www.ohsers.org">www.ohsers.org</a>   |        |        |             |     | X          |     |
| <b>State Teachers Retirement System (STRS)</b> ♦ (888) 227-7877 ♦ <a href="http://www.strsoh.org">www.strsoh.org</a>   |        |        |             |     | X          |     |
| <b>TIAA-CREF</b> ♦ Individual & Institutional Services, Inc. ♦ Matthew Gagnon ♦ (877) 209-3138 or (614) 659-1017 ♦ <a href="mailto:Mgagnon@tiaa-cref.org">Mgagnon@tiaa-cref.org</a> ♦ <a href="http://www.tiaa-cref.org/uakron">www.tiaa-cref.org/uakron</a>   |        | X      |             | X   |            | X   |
| <b>VALIC</b> ♦ James D. Musengo, CFP ♦ (330) 634-1879 ♦ <a href="mailto:james.musengo@valic.com">james.musengo@valic.com</a> ♦ <a href="http://www.valic.com">www.valic.com</a>  |        | X      | X           | X   |            | X   |
| <b>Women's Life</b> ♦ (800) 521-9292 ♦ <a href="mailto:website@womanslife.org">website@womanslife.org</a>  |        | X      |             |     |            |     |