

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 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.

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| American Century Investment | Matrix Trust Co. (formerly PenServ/First Investors/Foresters Financial) |
| American Fidelity Assurance Company | Metropolitan Life Insurance Co. |
| American Funds Distributors, Inc. (AFD) (District Specific) | Midland National |
| American United Life (One America) (Existing policies only) | Modern Woodman of America |
| Americo Financial Life and Annuity Insurance Company/Great Southern Life Insurance Company | National Life Group (Life Insurance Company of the Southwest) |
| Ameriprise | New York Life Insurance & Annuity Corp. |
| Aspire | North American Company for Life and Health |
| Brighthouse (formerly part of Metropolitan Insurance Co.) | Orion Portfolio Solutions (formerly FTJ FundChoice, LCC) |
| CalSTRS Pension 2 | Pacific Life Insurance Company |
| Corebridge Financial (formerly AIG Retirement Services/Valic) | PFS Investments Inc. |
| CTA Voluntary Retirement Plans for Educators, LLC | PlanMember Securities Corp./PlanMember Services Corp. |
| Equitable Life Insurance Company | Putnam Investments |
| Fidelity Investments (District Specific) | SchoolsFirst FCU (Retirement Builder Plan through Nationwide Financial) |
| Franklin Templeton Investments | Security Benefit Group |
| Global Atlantic Financial Group | Thrivent Financial |
| Great American Insurance Group (Annuity Investors Life Insurance Co.) (No New Accounts) | Transamerica Life Insurance Company (existing Transmark policies only) |
| GWN Securities, Inc. | USAA Life Insurance Company |
| Horace Mann Investors, Inc. | Vanguard Group |
| Horace Mann Life Insurance Company | Victory Capital Management (formerly USAA Investment Management Co.) |
| Industrial-Alliance Pacific Life Ins Co, US Branch | Voya Reliastar Life Insurance Company |
| Invesco Formerly Oppenheimer Funds | Voya Retirement Insurance and Annuity Company |
| Lincoln Financial Group (Lincoln National Life) | |
| Lincoln Investment, LLC | |
| MassMutual (Existing policies only) | |

457(b) Provider Names

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|---|---|
| SchoolsFirst FCU (Retirement Builder Plan through Nationwide Financial) | SchoolsFirst FCU Fixed 457(b) Share Certificate |
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For more information, please contact SchoolsFirst Plan Administration

 **Call** 800.462.8328, ext. 4727

 **Click** www.schoolsfirstfcu.org

 **Email** retirement@schoolsfirstfcu.org

* This list is subject to change.

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