

School District U-46's 403(b) Plan Financial Advisors

Investment Providers	Financial Advisor	Phone/E-mail	Provider Website
American Century Investments	Retirement Services	800-345-3533 To enroll visit americancentury.com/enroll or call and choose the participant gate	Not Available
Ameriprise Financial Services	Joy Ann Sweet Sherry Sandwick	847-898-9909 joyann.w.sweet@ampf.com 815-547-0011 sherry.d.sandwick@ampf.com	Not Available
Aspire Financial Services	Customer Service	866-634-5873 To enroll visit www.aspireonline.com , choose the plan type of 403(b), K-12, state of IL and drop down to the school district. You will then choose a financial advisor and contact the advisor of your choice participating in the plan. Email info@aspireonline.com	Aspire
AXA Equitable	Howell Granger Michael I. Bleke Thomas J. Noto	630-990-3089 Howell.granger@axa-advisors.com 630-954-6882 Michael.bleke@axa-advisors.com 847-621-0121 Thomas.noto@axa-advisors.com	AXA's Learning Lab
Commonwealth Annuity and Life Insurance Company	See Lincoln Investment Planning Advisors		Not Available
Fidelity Investments	Tax Exempt Group	800-343-0860 To enroll visit www.Plan.fidelity.com/enroll today and enter 50901 (the plan number.)	Fidelity Investments



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Foresters Financial	Christopher Cordon	Christopher.cordon@foresters.com	Not Available
Franklin Templeton	Retirement Services	800-527-2020 To enroll fill out a non-ERISA 403(b) application at the following website: www.Franklintempleton.com	Not Available
Great American	Leslie A. Schwartz	847-998-8143 lschwartz@lincolninvestment.com 800-438-3398 Ext. 11438 directconnectteam@gaig.com	Great American
Horace Mann	Ilir Sako	630-765-7616 Ilir.sako@horacemann.com	Horace Mann
ING Life Ins. and Annuity/ ReliaStar - VOYA	Ralph Varland Jeff Staley	630-245-4075 rvarland@ingfp.com 630-245-4087 Jeff.staley@ingfp.com	VOYA
Life Insurance Company of the SW	Darron Hacker	614-397-0414 dhacker@appreciationfinancial.com	Life Insurance Company of the Southwest
Lincoln Investment Planning	Daniel Laya TJ Riley	630-620-6100 x 5716 dlaya@lincolninvestment.com 630-620-6100 tjriley@lincolninvestment.com	Lincoln Investment Planning

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Investment Providers	Financial Advisor	Phone/E-mail	Provider Website
New York Life Insurance and Annuity	Evan Nolan	847-585-4937	New York Life
Oppenheimer Funds	Paul Wurtzeback Patrick Schiltz John Wedell	630-964-2098 Paul.wurtz@comcast.net 630-483-9455 Patrick.schiltz@edwardjones.com 847-608-9790 John.wedell@wellsfargoadvisors.com	Oppenheimer Funds
Putnam Investments	Thomas Potter	630-879-0059 Tom.potter@securitiesamerica.com	Putnam Investments
Security Benefit	Jason Seldomridge Erin Brown-Carter	847-852-5000 jseldomridge@alchemyfinancialgroup.com 847-289-3297 ecarter@KCTFinancial.org	Security Benefit
The Legend Group	Paul Wurtzebach	630-964-2098 Paul.wurtz@comcast.net	The Legend Group
Valic	Sandi Arko	815-355-2756 Sandi.arko@valic.com	VALIC
Thrivent Financial	Amy Green	847-204-7250 Amy.green@thrivent.com	Thrivent
USAA	403(b) Department	800-531-8292 option 1 To enroll, call 800-531-8292 option 1. You may also visit www.usaa.com to learn more.	Not Available



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Vanguard	403(b)(7) Client Service Center	800-962-5068 To enroll, call the Client Service Center Monday through Friday from 8am – 8pm and Saturday 9 am – 4pm ET. Plan ID 10100932 is needed upon calling.	Vanguard Group
Waddell & Reed	James P. Leyden	630-339-8171 jpleyden@wradvisors.com	Waddell & Reed