

North Shore School District 112

North Shore School District 112 & TSA Consulting Group-Qualified Plan Consultants (the compliance, Third Party Administrator (TPA), in terms of meeting Internal Revenue Service (IRS) regulations) DO NOT endorse, evaluate or sell any investment product or endorse any investment provider. The ultimate decision of where funds are invested rests with each individual participant using the approved investment providers listed below. The phone numbers and web addresses listed will provide you with information on contacting a local representative and/or how to open your account. You may choose to invest with any of the following investment companies. Please note that with the exception of Fidelity and Vanguard, you must work with the approved agent listed.

Please Note: In order to stay in compliance with the new 403(b) regulations, this list may periodically change.

Ameriprise Financial Services, Inc.

Local Agent: Michael G. Morrone, CRPC
Phone: (262) 656-3006
E-mail: michael.g.morrone@ampf.com
National: (800) 862-7919
Website: <http://www.ameriprise.com>
Products: Annuity/Mutual Fund

MetLife

Local Agent: Brian Salmonson, CFS, RFC
Phone: (847) 894-5113
E-mail: bsalmonson@metlife.com
National: (800) METLIFE
Website: www.metlife.com
Products: Annuity/Mutual Fund

Equitable 403b & 457

Agent: Todd Schlesinger, CFP
Phone: (224) 554-8067
E-mail: todd.schlesinger@equitable.com

Agent: Jon Laven
Phone: (224) 554-8066
E-mail: Jonathan.Laven@equitable.com
National: (800) 628-6673
Website: <http://www.equitable.com>
Products: Annuity/Mutual Fund

Invesco (formerly Oppenheimer Funds)

Local Agent: Todd Schlesinger, CFP
Phone: (224) 554-8067
E-mail: todd.schlesinger@equitable.com
National: (888) 470-0862
Website: www.invesco.com
Products:

TCG Advisors 403b & 457

Agent: Melissa Kirk
Phone: (512) 600-5256
E-mail: mkirk@tcgservices.com

Fidelity Investments 403b & 457

Local Agent: None
Phone: (800) 343-0860
Website: <https://www.fidelity.com>

VALIC-The Variable Annuity Life Insurance Company

Local Agents: Lucas Perkins
Phone: (312) 909-2670 (cell)
E-mail: lucas.perkins@valic.com

Lincoln Investment Planning 403b & 457

Agent: Deborah Strukoff CFP
Phone: (630) 620-6100 ext: 5737
Email: dstrukoff@lincolninvestment.com
National: (800) 242-1421
Website: www.lincolninvestment.com
Products: Annuity/Mutual Fund

Local Agents: Charles Capozzoli
Phone: (847) 287-1391 (cell)
Email: Charles.Capolloli@valic.com

Local Agents: Michael Asnis
Phone: (773) 571-9957 (cell)
E-mail: Michael.Asnis@valic.com

Vanguard

Local Agent: None
Phone: (800) 662-2739
Website: www.vanguard.com