Mesquite ISD: Vendor Solicitation Rules & Guidelines

Mesquite ISD strictly restricts campus access for all third-party vendors and financial advisors. To ensure compliance and minimize disruptions to our educational environment, all vendors must adhere to the following rules:

1. **Third-Party Administrator (TPA) Compliance**
   All 403(b) retirement plan vendors and agents must agree to and comply with our TPA's requirements.

- **TPA Contact:** National Benefit Services (NBS)
- **Phone:** 800-274-0503 Option 5
- **Website:** https://www.nbsbenefits.com/non-erisa-403b-forms/
- **Email:** 403bsupport@nbsbenefits.com

2. **Closed Campus Policy**
   Mesquite ISD operates under a strict **closed campus policy** regarding third-party solicitation.

- Agents, solicitors, and advisors are **not permitted on any district campus** to meet with employees, discuss retirement planning, or market products.
- One-on-one meetings on school property are strictly prohibited unless expressly authorized by District Administration.

3. **Marketing Materials, Mailboxes, and Phone Lines**

- **No Material Drops:** Agents and solicitors may not drop off literature, brochures, or marketing materials to be distributed on campuses or placed in employee mailboxes.
- **No Phone Solicitation:** Vendors are strictly prohibited from using district phone directories or individual employee phone numbers for solicitation purposes.

4. **Approved Marketing & Annual Health Fair**
   Authorized 403(b) vendors may be invited to participate in the district's **Annual Health and Benefits Fair**.

- Invited vendors may set up a marketing table to distribute district-approved materials and schedule off-campus appointments with interested employees.
- This event is coordinated directly by the Mesquite ISD Benefits Department. Uninvited vendors may not attend.

5. **Policy Violations & Penalties**
   Any agent, solicitor, or vendor who violates Mesquite ISD's policies will immediately forfeit all privileges to interact with district employees on school property. Severe or repeated violations will be escalated to the parent retirement plan vendor and, if necessary, reported to the **Texas Department of Insurance**.