

HELPFUL GUIDE TO ESTABLISH A 403(b) / 403(b)(7)

403(b) Tax Sheltered Annuity

FIRST FINANCIAL ADMINISTRATORS, INC.
(800) 523-8422
WWW.FFGA.COM
RETIREMENT@FFGA.COM

Please review the following information before submitting any SRA's (salary reduction agreements) to First Financial Administrators, Inc. (FFA):

STEPS TO ESTABLISH A NEW 403(b) / 403(b)(7) ACCOUNT

1. First you will need to select a vendor of your choice.
 - a. Go to www.ffga.com
 - b. Select login (right hand top corner)
 - c. Select Retirement Plan Information
 - d. Enter your employer name
 - e. Choose your authorized providersIf you already have a provider/vendor in mind but need to see if there is an agent in your area, then elect "403(b) Agent Search"
2. In choosing an approved vendor, you will also need an agent to assist you in your enrollment process. If you do not already have an agent, you will need to contact the chosen vendor for an agent near you. The agent will help you complete the following for you to be successfully enrolled:
 - a. Enrollment forms: You will need to complete an application with your selected vendor
 - b. SRA (salary reduction agreement)
 - c. Disclosure Agreement (required for new accounts outside of Texas) (Only Texas is exempt)

SRA's can be found by following these steps:

- a. Go to www.ffga.com
 - a. Select login (right hand top corner)
 - b. Select Retirement Plan Information
 - c. Enter your employer name
 - d. Select 403b Forms & Information
 - e. Select 403b salary reduction agreement
 - a. New accounts are REQUIRED to have the account number listed
 - b. New accounts are REQUIRED to have an agent/broker signature. (No Load companies are exempt from agent signature requirement)
3. After you have successfully enrolled you must submit your SRA to FFA.
 4. Any changes (increase, decrease or stop) to your established 403(b) account will require a new SRA. Agent signature is not required for changes only.

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AGENT INFORMATION

All agents must enroll with FFGA before business will be accepted

1. Go to www.ffga.com
2. Select menu (right hand top corner)
3. Under 403(b) Agent Services select “Agent Enrollment”
4. Select Enroll Now

When you enroll you are accepting the “**School District Rules for Solicitation**” for all employer plans we administer. Agents must enroll for new business to get processed.

EMPLOYEES & AGENTS

Once you have completed all necessary forms, please fax/mail to FFA, Attn: Retirement Services Department.

Fax to: 1-866-265-4594 or mail to the following address:

REGULAR MAIL:

First Financial Administrators, Inc.
P.O. Box 670329
Houston, Texas 77267-0329
Attn: Retirement Services

OVERNIGHT MAIL:

First Financial Administrators, Inc.
16945 Northchase Dr., Suite 1800
Houston, Texas 77060
Attn: Retirement Services

403(b)/403(b)(7) Providers—Texas School Districts

AIG RETIREMENT SERVICES (Formerly VALIC)	www.aig.com/retirementservices	800-448-2542
AMERICAN CENTURY INVESTMENTS	www.americancentury.com/enroll	800-345-3533
AMERICAN FUNDS DISTRIBUTORS, INC. ²	www.americanfunds.com/	800-421-9900
AMERICAN GENERAL LIFE INSURANCE COMPANY	www.aig.com/retirementservices	800-448-2542
AMERICAN UNITED LIFE INSURANCE COMPANY	www.oneamerica.com	800-249-6269
AMERICO FINANCIAL LIFE AND ANNUITY INS. CO. ²	www.americo.com	800-231-0801
AMERIPRISE FINANCIAL SERVICES, INC.	www.ameriprise.com	800-862-7919
ANNUITY INVESTORS LIFE INSURANCE COMPANY ¹	www.gafri.com	800-438-3398
ASPIRE FINANCIAL SERVICES, LLC	www.403bplan.info	866-634-5873
ATHENE USA (Formerly AVIVA) ¹	www.athene.com	800-225-8073
EQUITABLE LIFE INSURANCE COMPANY (Formerly AXA-Equitable)	www.equitable.com/teachers	800-628-6673
FEDERATED FUNDS	www.federatedinvestors.com	800-245-4770
FIDELITY SECURITY LIFE INS COMPANY	www.fsliins.com	800-648-8624
FINPATH 403(B)	http://finpath403b.com	800-943-9179
FRANKLIN TEMPLETON INVESTMENTS	www.franklintempleton.com	800-527-2020
GENERAL AMERICAN LIFE INSURANCE COMPANY ¹	www.metlife.com	800-638-9294
GLOBAL ATLANTIC FINANCIAL GROUP	www.globalatlantic.com	508-460-2401
GLP AND ASSOCIATES	www.glpwins.com	877-457-9467
GREAT AMERICAN INSURANCE GROUP ¹	www.gafri.com	800-789-6771
GREAT SOUTHERN LIFE ¹	www.greatsouthern.com	800-231-0801
GUGGENHEIM INVESTMENTS (Formerly Rydex Investments) ¹	www.guggenheiminvestments.com	800-820-0888
GWN SECURITIES, INC.	www.gwnsecurities.com	561-472-2700
HORACE MANN INVESTORS	www.horacemann.com	800-999-1030
HORACE MANN LIFE INSURANCE COMPANY	www.horacemann.com	800-999-1030
INDUSTRIAL ALLIANCE PACIFIC LIFE INS. & FINANCIAL SVCS. INC.	www.iaamerican.com	888-473-5540
INVESCO INVESTMENT SERVICES	www.invesco.com	800-959-4246
ISC GROUP, INC.	www.iscgroup.com	800-888-3520
JEFFERSON NATIONAL LIFE INSURANCE CO. ¹	www.jeffnat.com	866-667-0561
KANSAS CITY LIFE INSURANCE COMPANY ¹	www.kclife.com	800-821-6164
LINCOLN FINANCIAL GROUP ²	www.lfg.com	800-454-6265
LINCOLN INVESTMENT PLANNING, INC.	www.lincolninvestment.com	800-242-1421
MASSMUTUAL FINANCIAL GROUP	www.massmutual.com	800-234-5606
METROPOLITAN LIFE INS. CO. OF CONNECTICUT ¹	www.metlife.com/mlr	800-638-8378
METROPOLITAN LIFE INSURANCE COMPANY ²	www.metlife.com/mlr	800-638-8378
MIDLAND NATIONAL LIFE INSURANCE COMPANY	www.midlandannuity.com	866-270-9564
MODERN WOODMEN OF AMERICA	www.modern-woodmen.org	800-447-9811
NATIONAL LIFE GROUP	www.nationallife.com	800-906-3310
NEW YORK LIFE INS. AND ANNUITY CORP.	www.newyorklife.com	800-225-5695
NORTH AMERICAN CO. FOR LIFE AND HEALTH INSURANCE	www.nacolah.com	866-322-7065

403(b)/403(b)(7) Providers—Texas School Districts

ORION PORTFOLIO SOLUTIONS (FTJ)	www.orionportfoliosolutions.com	800-379-2513
PACIFIC LIFE INSURANCE COMPANY ¹	www.pacificlife.com	800-722-2333
PENSERV PLAN SERVICES	www.penserv.com	800-849-4001
PFS (PRIMERICA FINANCIAL SERVICES)	www.primerica.com/public	800-544-5445
PLANMEMBER SERVICES CORPORATION	www.planmember.com/retirement-services	800-874-6910
PROTECTIVE LIFE INSURANCE COMPANY ¹	https://insuranceservices.se2.com	800-456-6330
PUTNAM INVESTMENTS	www.putnam.com	800-662-0019
RBFCU	www.rbfcu.org/retirement-program	833--291-1310
RIVERSOURCE LIFE INSURANCE COMPANY	www.ameriprise.com	800-862-7919
SECURITY BENEFIT	www.securitybenefit.com	800-888-2461
SYMETRA LIFE INSURANCE COMPANY	www.symetra.com	800-796-3872
THRIVENT FINANCIAL FOR LUTHERANS	www.thrivent.com	800-847-4836
THRIVENT INVESTMENT MANAGEMENT INC.	www.thrivent.com	800-847-4836
TRANSAMERICA LIFE INSURANCE COMPANY ¹	www.oneamerica.com	800-317-2688
UNITED TEACHERS ASSOCIATION INSURANCE (UTA) ¹	www.gafri.com	800-438-3398
USAA LIFE INSURANCE COMPANY ¹	www.usaa.com	800-531-6396
THE VANGUARD GROUP, INC.	www.vanguard.com	800-662-2003
VICTORY CAPITAL MANAGEMENT (Formerly USAA MANAGEMENT)	www.vcm.com	800-531-8292
VOYA FINANCIAL, INC (VRIAC)	https://my.voya.com/	800-262-3862
VOYA FINANCIAL, INC. (RELIASTAR)	www.voya.com	877-884-5050
WADDELL & REED, INC.	www.waddell.com	888-923-3355
WESTERN NATIONAL LIFE INS. CO.	www.wnl.com	800-424-4990
ZURICH AMERICAN LIFE INSURANCE COMPANY ¹	https://insuranceservices.se2.com	800-457-9047

The companies on this list have agreed to share necessary compliance information with First Financial Administrators, Inc., your employer's 403(b) Plan Administrator, and are authorized providers in your plan eligible to receive ongoing 403(b) and/or 403(b)(7) salary reduction contributions after January 1, 2009, unless otherwise indicated.

¹ This company cannot accept new [Salary Reduction Agreement](#) (SRA) contributions and is closed to new enrollments.

² If applicable in your Employer's Plan

Please note: First Financial Administrators, Inc. does not endorse any company or agent. Please contact your tax advisor or financial representative for specific investment questions. Approved Providers are subject to change. For the most current listing, please contact First Financial Administrators, Inc.

Contact Us:

- Web: www.ffga.com
- Toll-free number: [1.800.523.8422](tel:18005238422), option 2 (Monday—Friday 7:00 a.m.—5:00 p.m. CST)
- Local number: 281-847-8422 (Monday—Friday 7:00 a.m.—5:00 p.m. CST)
- Fax number: 1.866.265.4594
- Email: retirement@ffga.com
- Online Contact Form: www.ffga.com/contact-retirement2/

Mailing	First Financial Administrators, Inc. Attn: Retirement Services PO BOX 670329 Houston, TX 77267-0329	Physical	First Financial Administrators, Inc. Attn: Retirement Services 16945 North Chase Blvd, Ste. 1800 Houston, TX 77060
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