Auburn Washburn
Unified School District 437

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403(b) ANNUITY INVESTMENT

With having on-line enrollment for Section 125 benefits, 403(b) annuity elections managed as a separate process. 403(b) elections are not included in the on-line enrollment. Follow the instructions on this page if you wish to start a 403(b) annuity. If you already have a 403(b) annuity through the district, you will be receiving a form through the district mail for you to make your election.

The District provides employees the opportunity to invest in a 403(b) account through payroll deduction. Bay Bridge Administrators manages this program for our district. Bay Bridge handles the monthly remitting to participating investment providers as well as monitors all 403(b) plan activity. This includes ensuring contributions are within legal limits, rollovers and transfers meet regulations and loans are properly administered.

Following is the list of 403(b) investment providers who may receive salary reduction contributions under the District's Plan:

- American Fidelity Assurance Company
- Ameriprise Financial Services
- Aspire Financial Services
- AXA Equitable Life Insurance
- Brighthouse Life Insurance
- Cetera Advisor Networks
- Fiduciary Trust So of New Hampshire
- Horace Mann
- MetLife Resources
- North American Company for Life & Health Services
- Primerica Shareholder Services
- OFG Financial Services
- Thrivent Financial
- Valic
- Voya Retirement Insurance & Annuity-Ease

If you wish to invest in a new 403(b) account, you'll need to select an investment provider from the above list, contact a representative of the investment provider for assistance setting up your account, complete a Bay Bridge Salary Reduction Agreement (SRA), and submit the SRA to the Business Office. The Salary Reduction Agreement can be found on the District Website under Business Office/Employee Benefits.

Employees have the opportunity to enroll in a 403(b) annuity on either of the following dates:

- New Hires SRA must be submitted to the Business Office at initial benefit enrollment
- **January 1** SRA must be submitted to the Business Office before **December 1st**

For more information, you can access the Bay Bridge website at www.bbadmin.com/retirement and follow these instructions:

- Select your state from the drop down menu
- Select your employer from the drop down menu

This website includes the list of approved providers, plan document, employee handbook, plan summary description, salary reduction agreement and a transaction authorization form.

If you have questions, please contact the Business Office at 785-339-4053.