

Approved Provider List*



403(b) Provider Names

Below is a list of approved providers for the districts/schools that SchoolsFirst Plan Administration serves as third-party administrator. All providers are registered with CalSTRS 403(b) Compare and have entered into an information sharing agreement with SchoolsFirst Plan Administration. More information regarding each provider is available by visiting www.403bcompare.com. The list of providers is subject to change.


AIG Retirement Services (formerly VALIC)	MassMutual
American Century Investment	Metropolitan Life Insurance Co.
American Fidelity Assurance Company	Midland National
American Funds Distributors, Inc. (AFD) (District Specific) **	Modern Woodman of America
American United Life (One America)	National Life Group (Life Insurance Company of the Southwest)
Americo Financial Life and Annuity Insurance Company/Great Southern Life Insurance Company	New York Life Insurance & Annuity Corp.
Ameriprise	North American Company for Life and Health
Aspire	Orion Portfolio Solutions (formerly FTJ FundChoice, LLC)
AXA Equitable Life Insurance Company	Pacific Life Insurance Company
Brighthouse (formerly part of Metropolitan Insurance Co.)	PenServ (formerly First Investors Funds distributed by Foresters Financial)
CalSTRS Pension 2	PFS Investments Inc.
CTA Voluntary Retirement Plans for Educators, LLC	PlanMember Securities Corp./PlanMember Services Corp.
Fidelity Investments (District Specific) **	Putnam Investments
Franklin Templeton Investments	SchoolsFirst FCU (Retirement Builder Plan through Nationwide Financial)
Global Atlantic Financial Group	Security Benefit Group
Great American Insurance Group (Annuity Investors Life Insurance Co.) (Existing Policies Only)	Thrivent Financial
GWN Securities, Inc.	Transamerica Life Insurance Company (existing Transmark policies only)
Horace Mann Investors, Inc.	USAA Life Insurance Company
Horace Mann Life Insurance Company	Vanguard Group
Industrial-Alliance Pacific Life Ins Co, US Branch	Victory Capital Management (formerly USAA Investment Management Co.)
Invesco (formerly Oppenheimer Funds)	Voya Reliastar Life Insurance Company
IPX	Voya Retirement Insurance and Annuity Company
Lincoln Financial Group (Lincoln National Life)	Waddell & Reed (Ivy Investments)
Lincoln Investment, LLC	


457 (b) Provider Names


SchoolsFirst FCU
(Retirement Builder Plan through Nationwide Financial)

SchoolsFirst FCU Fixed 457(b) Share Certificate

For more information, please contact SchoolsFirst Plan Administration, LLC

 **Call** 800.462.8328, ext. 4727

 **Click** www.schoolsfirstfcu.org

 **Email** retirement@schoolsfirstfcu.org

Retirement planning advisors and services provided as a benefit to SchoolsFirst FCU Members by SchoolsFirst Plan Administration, LLC, a wholly-owned affiliate of SchoolsFirst FCU. Securities sold, advisory services offered through CUNA Brokerage Services, Inc. (CBSI), member FINRA/SIPC, a registered broker/dealer and investment advisor. CBSI is under contract with the SchoolsFirst FCU to make securities available to Members. Not NCUA/NCUSIF/FDIC insured, may lose value, no financial institution guarantee. Not a deposit of any financial institution. CUNA Brokerage Services, Inc., is a registered broker/dealer in all fifty states of the United States of America.

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** Not available in all districts. Please confirm availability with SchoolsFirst Plan Administration, LLC