

# Retirement Savings Program (CONT.)

## PRE-TAX AND AFTER-TAX OPTIONS

### Enrolling in the Plans

To participate, you must select an investment plan from the list of authorized investment providers below. Check the list to determine whether the provider you select offers the plan(s) you want. Carefully compare investment products before you select a provider and take the time to understand the investments you are choosing and the implications of your investment decision. If you do not understand the information presented to you by a sales representative or are unsure about a product, do not complete the online payroll deduction authorization.

The authorized list does not reflect any opinion as to financial strength or the quality of the product or service for any company. The products that these companies provide are typically standard-interest annuities, variable annuities, and mutual funds. Payroll deductions are permitted for those vendors who have made proper application and are on Pinellas County Schools' list of authorized vendors. Pinellas County Schools does not endorse or recommend any product or vendor and does not offer financial advice.

### 403(B) AND 457(B) DISTRIBUTION TRANSACTIONS

Distribution transactions may include any of the following: loans, rollovers, exchanged, hardships, or other normal distributions. You may request these distributions by completing the necessary forms obtained from your provider and TSA Consulting Group, Inc. (TSACG) as required. All completed provider forms, accompanied by the Transaction Routing Request form, should be submitted to TSACG for processing. TSACG's Transaction Routing Request form may be downloaded at <https://www.tsacg.com>.

As of March 1, 2019, Achieva, American Century, Plan Member, Security Benefit, The Legend Group, and Waddell & Reed have been placed in an inactive status. Their existing clients have been grandfathered in.

**If you have questions about  
a vendor, you can call:**

**Florida Department of Financial Services  
Consumer Helpline  
(800) 342-2762**

**To file a complaint about a vendor,  
go online to:**

**Florida Office of  
Financial Regulations  
[www.flofr.com/sitePages/  
fileacomplaint](http://www.flofr.com/sitePages/fileacomplaint)**





# Retirement Savings Program (CONT.)

## PRE-TAX AND AFTER-TAX OPTIONS

### Other Information

TSA Consulting Group is the third party administrator for the Pinellas County Schools' Retirement Savings Program. If you wish to start a deduction, increase, decrease or suspend your deduction to your Roth, 403(b) or 457 plan, you must utilize the online system. The ART system is used when requesting loans, rollovers, distributions, and contract exchanges from your account. The online process eliminates the need for paper SRAs and allows around-the-clock access for employees.

To use the ART system you will need to establish your initial ART system login, visit the secure ART login website: [www.tsacg.com/individual/art-help](http://www.tsacg.com/individual/art-help).

To open up an account you must go through a current representative of the district's 403(b) and 457 approved Investment Providers who are trained and able to assist employees. TSA Consulting Group has a toll free customer service help line to assist you (888) 796-3786, Option 5.

Retirement Savings Program				
of Authorized Investment Providers				
PRODUCTS AVAILABLE				
COMPANY NAME	403(B)	457	ROTH 403(b)	TELEPHONE
AIG Retirement Services (Valic)	X	X	X	813-269-3362
Equitable**	X	X	X	888-890-0013, Ext 195
Fidelity Funds (No Load)*	X	X		800-343-0860
Franklin Templeton	X		X	727-588-6140
Lincoln Investment	X	X	X	813-600-3268
Suncoast Credit Union	X	X	X	866-300-9382, Option 2
VOYA/Aetna	X	X	X	813-541-1213

\*\*Equitable was formerly known as AXA Advisors. Visit the secure ART login website to open an account [www.tsacg.com/individual/art-help](http://www.tsacg.com/individual/art-help)

\*Call Fidelity or go online to request a 403(b) or 457(b) enrollment kit and fund prospectus.