

University of Idaho

Supplemental Retirement Vendors and Plans

Updated: September, 2019

Vendor	Contact Information	Plans Available
<p>TIAA – Teachers Insurance & Annuity Association</p>	<p>(800) 842-2733 www.tiaa.org</p>	<p>403(b) 457(b) Roth 403(b)</p>
<p>VALIC (AIG) – Variable Annuity Life Insurance Company</p>	<p>(800) 448-2542 www.valic.com</p> <ul style="list-style-type: none"> • <u>Moscow / Northern Idaho</u> Johnny Johnston (509) 251-2145 john.johnston@valic.com Jillian Bell (509) 994-9803 jillian.bell@valic.com • <u>Boise / Caldwell / Parma</u> Jennifer Braun-Blanco (208) 859-2728 jennifer.braun-blanco@valic.com • <u>Twin Falls</u> Guy Ferguson (208) 608-6239 guy.ferguson@valic.com • <u>Pocatello / Idaho Falls</u> Al Richmond (208) 569-6057 al.richmond@valic.com 	<p>403(b) 457(b) Roth 403(b)</p>
<p>Nationwide Retirement Solutions (State of Idaho Deferred Compensation Plan)</p>	<p>(800) 627-1583 www.idahodc.com/iApp/tcm/idahodc/index.jsp</p> <ul style="list-style-type: none"> • For a list of specialists available in your area contact (800) 627-1583 	<p>457(b)</p>

Vendor	Contact Information	Plans Available
American Funds (#210191137)	<p><u>Edward Jones</u> www.edwardjones.com</p> <ul style="list-style-type: none"> • Jeff Bollinger** (208) 882-4474 • Carolyn Hicklin** (208) 883-4460 • Jay Mlazgar** (208) 882-1234 <p><u>Northwestern Mutual Investment Company</u> www.northwesternmutual.com</p> <ul style="list-style-type: none"> • Paul Hanson** (208) 882-7711 <p><u>Waddell & Reed Financial Advisors</u> www.waddell.com</p> <ul style="list-style-type: none"> • Jeff Feuerstein** (509) 332-2543 www.yourvaluesourvision.WRFA.com <p>**American fund advisors listed above are not an all-inclusive list.</p>	403(b)
PERSI Choice – available for active PERSI members only	(866) ID-PERSI / (866) 437-3774 www.persi.idaho.gov	401(k)
Fidelity Investments	(800) 343-0860 www.fidelity.com <ul style="list-style-type: none"> • <u>Moscow</u> Michael Fereday (208) 883-8285 	403(b)

Process:

- Select a provider from the list above
- Setup an account with the authorized provider
- Submit a salary reduction form to Benefit Services:
 - Campus zip – 4332
 - Fax to (208) 885-3330
 - Scan and Email to benefits@uidaho.edu

The annual limits may change from year to year. You are responsible for adjusting your annual contributions each year. If your goal is to save the maximum allowed, please provide Benefit Services with a new deduction form at each increase.

Questions?

Call Benefit Services at (208) 885-3608 or email benefits@uidaho.edu