

# University of Idaho

## Supplemental Retirement Vendors and Plans

Updated: Oct. 2020

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

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