



Approved Provider List*

403(b) Provider Names

Below is a list of approved providers for the districts/schools that Schools First 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.

American Century Investment

American Fidelity Assurance Company

American Funds Distributors, Inc. (AFD) *(District Specific)*

American United Life (One America) *(Existing policies only)*

Americo Financial Life and Annuity Insurance Company/Great Southern Life Insurance Company

Ameriprise

Aspire

Brighthouse *(formerly part of Metropolitan Insurance Co.)*

CalSTRS Pension 2

Corebridge Financial *(formerly AIG Retirement Services/VALIC)*

CTA Voluntary Retirement Plans for Educators, LLC

Equitable Life Insurance Company

Fidelity Investments *(District Specific)*

Fiduciary Trust Company of New Hampshire *(formerly Waddell & Reed/Ivy Investments)*

Franklin Templeton Investments

Global Atlantic Financial Group

Great American Insurance Group (Annuity Investors Life Insurance Co.) *(No New Accounts)*

GWN Securities, Inc.

Horace Mann Investors, Inc.

Horace Mann Life Insurance Company

Industrial-Alliance Pacific Life Ins Co, US Branch.

Invesco *(formerly Oppenheimer Funds)*

IPX

Lincoln Financial Group (Lincoln National Life)

Lincoln Investment, LLC

MassMutual *(Existing policies only)*

Matrix Trust Co. *(formerly PenServ/First Investors/Foresters Financial)*

Metropolitan Life Insurance Co.

Midland National

Modern Woodman of America

National Life Group (Life Insurance Company of the Southwest)

New York Life Insurance & Annuity Corp.

North American Company for Life and Health

Orion Portfolio Solutions *(formerly FTJ FundChoice, LLC)*

Pacific Life Insurance Company

PFS Investments Inc.

PlanMember Securities Corp./PlanMember Services Corp.

Putnam Investments

SchoolsFirst FCU (Retirement Builder Plan through Nationwide Financial)

Security Benefit Group

Thrivent Financial

Transamerica Life Insurance Company (existing Transmark policies only)

USAA Life Insurance Company

Vanguard Group

Victory Capital Management *(formerly USAA Investment Management Co.)*

Voya Reliastar Life Insurance Company

Voya Retirement Insurance and Annuity Company

457(b) Provider Names

SchoolsFirst FCU (Retirement Builder Plan through Nationwide Financial)

Fidelity Investments *(District Specific)*

SchoolsFirst FCU Fixed 457(b) Share Certificate

CalSTRS Pension 2 *(District Specific)*

For more information, please contact SchoolsFirst Plan Administration



Call 800.462.8328, ext. 4727



Click www.schoolsfirstfcu.org



Email retirement@schoolsfirstfcu.org

* This list is subject to change.

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