



NORTH TONAWANDA CITY SCHOOL DISTRICT

ADMINISTRATIVE SERVICES

176 Walck Road • North Tonawanda, New York 14120 • (716) 807-3510 • FAX (716) 807-3522

GREGORY J. WOYTILA
Superintendent of Schools

LAURIE BURGER
Executive Director of Human Resources
and Administrative Services

TO: All Employees
FROM: Laurie Burger, Executive Director of Human Resources and Administrative Services
DATE: Tax Sheltered Annuities (403-b)

All North Tonawanda City School District employees are eligible to participate in Tax Sheltered Annuity Programs (TSA) or 403-b Plans through payroll deduction.

TSA/403-b programs allow individuals to divert a portion of their wages on a tax deferred basis into various retirement investment options.

Any employee wishing to obtain additional information regarding TSA's or choosing to participate, may contact one of the approved agents listed on the back of this memo.

ALL EMPLOYEES MUST COMPLETE, SIGN AND RETURN THE ENCLOSED FORM. PLEASE MAKE SURE YOU COMPLETE PARTS 1,3, & 5.

Any individual choosing not to participate at this time may choose to do so at a later date.

Please feel free to contact Kelly Lord (807-3506) in our Payroll Department should you have any questions.

Thank you for your cooperation.



NORTH TONAWANDA CITY SCHOOL DISTRICT

ADMINISTRATIVE SERVICES

176 Walck Road • North Tonawanda, New York 14120 • (716) 807-3510 • FAX (716) 807-3522

GREGORY J. WOYTILA
Superintendent of Schools

LAURIE BURGER
Executive Director of Human Resources
and Administrative Services

MEMORANDUM

TO: All District Employees
FROM: Payroll
DATE: July 1, 2013
RE: TSA Company Information

These are the only allowable TSA funds/companies that are used by the District. Any agent working with these funds/companies is acceptable. The below list includes addresses and phone numbers found in the phone book.

METLIFE

6265 Sheridan Drive, Suite 200
Williamsville, NY 14221
626-0048

FIRST INVESTORS CORP.

2430 North Forest Rd., Suite 130
Getzville, NY 14068
636-9535

THE LEGEND GROUP (Employee Benefit Acct.)

450 Corporate Pkwy., Suite 102
Amherst, NY 14226
837-3335

THE AXA EQUITABLE (AXA Advisors)

325 Essjay Rd., Suite 308
Williamsville, NY 14221
626-2564

THE VARIABLE ANNUITY LIFE INS. CO.

6897 Creekside Dr.
Lockport, NY 14094
1 (800) 448-2542/ Local #: 625-6066

RIVERSOURCE LIFE INS. CO.

4140 Sheridan Dr.
Williamsville, NY 14221
626-5447

LINCOLN INVESTMENT PLANNING (L & M Financial)

3820 Sheridan Dr.
Amherst, NY 14226
839-1234

ING (Aetna)

6225 Sheridan Dr.
Williamsville, NY 14221
626-3925

SGROI FINANCIAL, LLC

965 Union Rd.
West Seneca, NY 14224
674-6700

GWN SECURITIES (Employee Dep Acct/Chase)

8070 Floss Lane
East Amherst, NY 14051
741-3163

MISC. FUNDS AVAILABLE:

Oppenheimer Shareholder Svcs.

FTJ FUNDCHOICE

c/o L & M Financial Services
3820 Sheridan Drive
Amherst, NY 14226
839-1234