

**MAYFIELD CITY SCHOOL DISTRICT  
SECTION 403(b) PLAN**

**Annual Eligibility Notice  
2018**

**Mayfield City School District** offers our eligible employees the opportunity to save for retirement by participating in the Mayfield City School District Section 403(b) Plan. You can participate in this plan by making pre-tax contributions. You are eligible to participate in this plan, whether or not you are actively contributing to it.

**Not yet contributing to the 403(b) plan?**

To start your contributions to the 403(b) plan, complete and return a salary reduction agreement to the Payroll Department, Baker Administration Building, 1101 SOM Center Road, Mayfield Hts, OH 44124. You must choose a provider from the District's approved vendor list. Please note that in addition to completing and returning a salary reduction agreement, you must also establish an account with the appropriate investment provider(s) that you have selected on the salary reduction agreement and you may also need to provide any additional information that may be required to enroll you in the 403(b) plan.

**Already contributing the 403(b) plan? Great news! You have an opportunity to increase your contributions to the 403(b) Plan.**

If you are already currently contributing to the 403(b) plan, you may be able to increase your pre-tax contributions. To change your contributions, complete and return a salary reduction agreement to the Payroll Department, Baker Administration Building, 1101 SOM Center Road, Mayfield Hts, OH 44124.

Of course, you can keep your contributions at their current level. In the alternative, if your current financial situation means that you need to lower your savings for retirement, you can change your contribution rate by completing and returning a salary reduction agreement as described above.

**How much can I contribute?**

In general, you may contribute up to \$18,500 in 2018. This amount may be adjusted annually. Also, if you are at least 50 years old and/or you have completed at least 15 years of service, you may also be able to make additional catch-up contributions. Each catch-up has its own limits.

This Notice is not intended as tax or legal advice. Neither your employer nor the investment providers offering retirement savings products under the plan can provide you with tax or legal advice. Employees are encouraged to contact their financial representative or tax professional with any questions.

**MAYFIELD CITY SCHOOL DISTRICT  
TAX SHELTERED ANNUITY – PARTICIPATING PROVIDERS  
403b/457b**

**403b**

**Voya Financial Advisors (2000) (2002)%**

Corporate Plaza I – Suite 100  
6450 Rockside Woods Blvd South  
Independence, OH 44131-2230  
Contact: Scott Golding  
216-447-3773/800-552-2181, ext 4023773  
[Scott.Golding@voyafa.com](mailto:Scott.Golding@voyafa.com)

**VALIC (2016) (2018)%**

Two Summit Park Drive, Suite 500  
Independence, OH 44131  
Contact: Greg Meador  
216-643-6340  
[Greg.Meador@valic.com](mailto:Greg.Meador@valic.com)

**AXA/The Equitable/Equi-Vest (2026) (2028)%**

1001 Lakeside Avenue, Suite 1650  
Cleveland, OH 44114  
Contact: Vincent Domenico  
216-615-7486  
[Vincent.Domenico@axa-advisors.com](mailto:Vincent.Domenico@axa-advisors.com)

**Foresters Financial\* (2004)**

6133 Rockside Road, Suite 208  
Independence, OH 44131  
Contact: Chris Ahrens  
216-573-1010/800-351-0144 ext 209  
[christopher.ahrens@firstinvestors.com](mailto:christopher.ahrens@firstinvestors.com)

**The Legend Group (2042)**

Contact: Todd Stout  
2 Summit Park Drive, Suite 600  
Independence, OH 44131  
800-417-9099/614-404-2699  
[tstout@legendgroup.com](mailto:tstout@legendgroup.com)

**New York Life Insurance Company (2038) (2040)%**

6000 Lombardo Center, Suite 300  
Seven Hills, OH 44131  
Contact: Jon Stamberger  
440-554-0616  
[jmstamberger@ftnewyorklife.com](mailto:jmstamberger@ftnewyorklife.com)

**Great American (2022) (2024)R**

26915 Westwood Road, Suite A2  
Westlake, OH 44145  
Contact: Nathan Snarr  
800-438-3398/801-205-5655  
[nsnarr@appreciationfinancial.com](mailto:nsnarr@appreciationfinancial.com)

**Reserve Financial Agency Group (2034)**

924 Westpoint Parkway, Suite 100  
Westlake, OH 44145  
800-521-3132/440-617-9459  
[info@resfin.com](mailto:info@resfin.com)

**Tax Advantage First Group (2030) ING-R**

6571 Wilson Mills Road (2032) GALIC  
Mayfield Village, OH 44143  
440-449-9000/800-449-9044  
[www.paycheckbonus.com](http://www.paycheckbonus.com)

**Lincoln National Life (2006) (2008)%**

PO Box 3595  
Cuyahoga Falls, OH 44223  
Contact: Ron Ross  
877-929-8393 Fax: 260-455-4255  
[Ronald.Ross@LFG.com](mailto:Ronald.Ross@LFG.com)

**Aspire Financial (2044)**

4010 Boy Scout Blvd, Suite 450  
Tampa, FL 33607  
Contact: Jarad Regano  
Regano Financial  
440-306-0001/440-479-9328  
[save@reganofinancial.com](mailto:save@reganofinancial.com)  
or  
Contact: Thomas Geraci  
Purtill Financial LLC  
440-484-5340/855-849-5010  
[Tom@PurtillFinancial.com](mailto:Tom@PurtillFinancial.com)

**MetLife Resources (2010)**

9200 South Hills Blvd, Ste 100  
Broadview Hts, OH 44147  
Contact: Raelene Nickerson  
330-808-4749  
[rnickerson@metlife.com](mailto:rnickerson@metlife.com)

\*Check with the representative for restrictions associated with a Foresters Financial 403b account

02/07/2017

**MAYFIELD CITY SCHOOL DISTRICT  
TAX SHELTERED ANNUITY – PARTICIPATING PROVIDERS  
403b/457b**

**457b**

**Voya Financial Advisors (2905) (2910)%**

Corporate Plaza I – Suite 100  
6450 Rockside Woods Blvd South  
Independence, OH 44131-2230  
Contact: Scott Golding  
216-447-3773/800-552-2181

**457b**

**Ohio Deferred Compensation (2900)**

257 East Town Street, Suite 457  
Columbus, OH 43215-4626  
Contact: Cal Temple, Pam Boyce  
877-644-6457/440-466-2277  
[BoyceP1@nationwide.com](mailto:BoyceP1@nationwide.com)

\*Check with the representative for restrictions associated with a Foresters Financial 403b account

02/07/2017