University of Idaho

Tax Sheltered Annuity and Insurance Companies for Supplemental Retirement Accounts

Updated: October 2012

Vendor	Contact Information	Plans Available
TIAA-CREF (Teachers Insurance and Annuity Association-College Retirement Equities Fund)	**(800) 842-2733** www.tiaa-cref.org	**403(b), 457(b) & Roth 403(b)**
VALIC (Variable Annuity Life Insurance Company)	**(800) 448-2542** www.valic.com • **Moscow / Northern Idaho** Johnny Johnson (509) 344-2335 john.johnston@valic.com • **Twin Falls / Boise / Caldwell / Nampa Areas** Jennifer Braun-Blanco (208) 859-2728 Jennifer.Braun-Blanco@valic.com • **Pocatello / Idaho Falls** Al Richmond (208) 569-6057 al.richmond@valic.com	**403(b), 457(b) & Roth 403(b)**
Nationwide Retirement Solutions (previously PEBSCO – Public Employee Benefit Services Corporation)	**(800) 627-1583** http://idahodc.nrsservicecenter.com/nrs/?Site=Idaho • David Miller (208) 755-8238 (800) 627-1583 x 3 x 6	**457(b)**
Waddell & Reed Financial Advisors	www.waddell.com • Jeff Feuerstein (509) 332-2543 www.yourvaluesourvision.WRFA.com	**403(b)**
Fidelity Investments	**(800) 343-0860** www.fidelity.com • **Moscow** Michael Fereday (208) 883-8285	**403(b)**

Vendor	Contact Information	Plans Available
American Funds (#210191137)	**Edward Jones** www.edwardjones.com • Jeff Bollinger (208) 882-4474 • Bryan Hanson (208) 882-1234 **Northwestern Mutual Investment Company** www.northwesternmutual.com • Paul Hanson (208) 882-7711 **Waddell & Reed Financial Advisors** www.yourvaluesourvision.WRFA.com • Jeff Feuerstein (509) 332-2543	**403(b)**
PERSI Choice (available for active PERSI members only)	**(866) ID-PERSI / (866) 437-3774** www.persi.state.id.us/Choice.htm	**401(k)**

Process:

- Select a provider from the list above
- Set up an account with 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

Please note that 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 allowable, 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