

**School District of Upper Moreland Township**  
**2900 Terwood Road**  
**Willow Grove PA 19090**

**TAX-DEFERRED ANNUITY BROKERS**

*As an employee of the District, you are eligible to contribute to a tax-deferred annuity (403(b)(7) or 457(b)) through payroll deduction. Please contact any broker listed below for more information.*

*To start payroll deductions, establish an account with the vendor(s) of your choice, then complete the District's internal Salary Reduction Agreement and return it to the Business Office. This form is available on the district website or upon request from the Business Office and is required in order to start, stop or make changes to your payroll deduction.*

<b>ASPIRE FINANCIAL SERVICES *</b> Scott Marshall, Representative (267) 880-6576 100 Hyde Park Doylestown, PA 18902	<b>LINCOLN INVESTMENT PLANNING, INC. *</b> Sam Newsham, Representative (800) 242-1421 x 4500 101 West Avenue, Suite 200 Jenkintown, PA 19046
<b>AXA EQUITABLE LIFE INS CO *</b> Chris Strivieri, Representative (215) 497-8312 760 Newtown Yardley Road, Suite 114B Newtown, PA 18940	<b>METLIFE</b> Scott Lissansky, Representative (856) 802-0980 505 South Lenola Road, Suite 203 Morristown, NJ 08057
<b>FIDELITY INVESTMENTS *</b>  (800) 343-0860	<b>OPPENHEIMER FUNDS</b> Debra Schachter, Representative (610) 941-6161 460 Norristown Road, Suite 310 Blue Bell, PA 19422
<b>KADES – MARGOLIS/Money by Design *</b> <b>KADES – MARGOLIS/Security Benefit *</b> <b>KADES – MARGOLIS/Symetra Financial</b> Randy Hartzel, Representative (800) 433-1828 ext. 129 Shawn Anderson, Representative (800) 433-1828 ext. 155 940 West Valley Road, Suite 1200 Wayne, Pa 19087	<b>VANGUARD INVESTMENTS/NEWPORT GROUP</b> (800) 569-4903 P.O. Box 1110 Valley Forge, PA 19482 www.vanguard.com
<b>LINCOLN FINANCIAL ADVISORS *</b> Michael Sadek, Representative (856) 727-4003 717 Mill Street Moorestown NJ 08057-1803	<b>VOYA FINANCIAL *</b>  (800) 584-6001

\* OFFERS BOTH 403(b) and 457(b) PLANS