

School District of Waupaca  
403(b) Tax Sheltered Annuity Options

<b>Company</b>	<b>Agent Contact</b>
WEA TSA Trust PO Box 7893 Madison, WI 53707 (800) 279-4030	<ul style="list-style-type: none"> <li>• New Account – Brad Brinkmeier 800-279-4030 ext 4518  <a href="https://calendly.com/bbrinkmeier/403b-ira-phone-consultation?month=2024-06">https://calendly.com/bbrinkmeier/403b-ira-phone-consultation?month=2024-06</a></li> </ul> <p>Packets are also available in the district office.</p> <ul style="list-style-type: none"> <li>• Existing Account questions – 1-800-279-4030 ext 8567  <a href="https://calendly.com/reticonswea/r/">https://calendly.com/reticonswea/r/</a></li> </ul>
<p><b>*Grandfathered vendors – No new accounts can be established</b></p>	
<p>*Aspire Financial            Plan Implementation Dept.            (866) 634-5873</p>	<ul style="list-style-type: none"> <li>• Edward Jones – Ben Durfee, Investment Rep., Waupaca, WI 54981 (715) 258-1382</li> <li>• Edward Jones – Pete Vanden Bush, Investment Rep., Waupaca, WI 54981 (715) 256-1382</li> <li>• Jeff Diehl, Appleton, WI (920) 730-3400 / (800) 381-2381 Fax (920) 730-3418</li> <li>• Suzanne S. Udoni &amp; Eric P. Spindt            Financial Advisor/Certified Retirement Counselor            Waypoint Financial Solutions, Inc.            102 Water Street, Waupaca, WI 54981            (715) 258-8822  <a href="http://www.mywaypoint.net">www.mywaypoint.net</a>  <a href="mailto:sudoni@mywaypoint.net">sudoni@mywaypoint.net</a>  <a href="mailto:espindt@mywaypoint.net">espindt@mywaypoint.net</a></li> </ul>
<p>*Franklin Templeton Trust Co.            700 Central Ave.            P.O. Box 33030            St. Petersburg, FL 33701            (813) 823-8712 / (800) 237-0738</p>	<ul style="list-style-type: none"> <li>• Edward Jones – Ben Durfee, Investment Rep., Waupaca, WI 54981 (715) 258-1382</li> <li>• Edward Jones – Pete Vanden Bush, Investment Rep., Waupaca, WI 54981 (715) 256-1382</li> <li>• Jeff Diehl, Appleton, WI (920) 730-3400 / (800) 381-2381 Fax (920) 730-3418</li> <li>• Suzanne S. Udoni &amp; Eric P. Spindt            Financial Advisor/Certified Retirement Counselor            Waypoint Financial Solutions, Inc.            102 Water Street, Waupaca, WI 54981            (715) 258-8822  <a href="http://www.mywaypoint.net">www.mywaypoint.net</a>  <a href="mailto:sudoni@mywaypoint.net">sudoni@mywaypoint.net</a>  <a href="mailto:espindt@mywaypoint.net">espindt@mywaypoint.net</a></li> <li>• Gary E. Janssen Accounting &amp; Tax Service, Inc., Waupaca, WI 54981 (715) 258-3325 / (800) 383-2126</li> <li>• Michael Verstegen, LPL Financial, 4830 N Ballard Rd., Appleton, WI 54913 (920) 882-4781</li> <li>• Mitch Nonn, Primerica Financial Services            2390 W. Nordale Drive, Unit B, Appleton, WI 54919            (920) 460-9817</li> </ul>
<p>*Thrivent Financial            4321 N Ballard Rd            Appleton, WI 54919            (800) 847-4836</p>	<ul style="list-style-type: none"> <li>• Brett Stoeger            (920) 422-1103</li> </ul>