

Appendix 1
Authorized vendors under the Donna ISD 403(b) plan are:

ASpire Financial Services	www.403bplan.info	866-634-5873
AXA Equitable Life Insurance Company	www.axa.com/teacher	800-628-6673
GWN Marketing, Inc. (1)		866-650-0132
Horace Mann	www.horacemann.com	800-999-1030
IPX Retirement	www.ipxretirement.com	844-788-3474
Jefferson National Life	www.jeffnat.com	866-667-0561
MetLife Insurance Company	www.metlife.com/mlr	800-236-8489
Midland National Life	www.mnlife.com	877-586-0240
National Life Group	www.nationallife.com	800-732-8939
New York Life Insurance Company	www.newyorklife.com	800-710-7945
North American Co. for Life and Health Insurance	www.nacolah.com	866-322-7065
Oppenheimer Funds	www.oppenheimerfunds.com	800-525-7048
PlanMember (provider for Federated Funds)		800-874-6910
PlanMember Services Corporation	www.planmember403b.com	800-874-6910
ReliaStar Life Insurance Company	www.ingretirementplans.com	877-884-5050
RiverSource Life Insurance	www.ameriprise.com	800-862-7919
Security Benefit	www.securitybenefit.com	800-888-2461
The Legend Group	www.legendgroup.com	561-694-0110
Voya Retirement Ins. & Annuity Company	www.voya.com	888-410-9482
Waddell & Reed	www.waddell.com	888-923-3355

Important Note:

As provided under the Plan, any authorized Vendor named above agrees to share information necessary for compliance purposes with Employer, and Administrator and/or with any other 403(b) provider as may be required or desirable to facilitate compliance with the Plan and all applicable laws and regulations.

- (1) These non-certified TRS companies have agreed that they will only accept SRA deferrals for TRS certified products that are on the TRS List of Certified Companies.
- (2) These companies can not accept new SRA deferrals and are grandfathered under TRS guidelines.

This appendix is dated: March 14, 2024