

JEFFERSON PARISH SCHOOL BOARD

SOLICITORS AGREEMENT

Processing Rules for Solicitors

Jefferson Parish School Board desires to offer employees a payroll reduction plan for the purchase of annuities or other authorized investments as authorized under the provisions of Public Law 87-370, U.S. Internal Revenue Code Section 403(b) as amended to include 403(b)(7). Solicitors wishing to solicit these accounts from Jefferson Parish School Board employees must meet the requirements outlined below. Failure to comply will be cause for non-acceptance of any contract submitted by that solicitor.

1. National Plan Administrators, Inc., herein after referred to as "NPA", has been contracted by Jefferson Parish School Board as the Third Party Administrator for processing the above mentioned accounts. NPA will provide a consolidated billing service to the School Board and disburse payments to all providers within 2 business days after receipt of payment and backup material from the School Board (holidays and weekends excluded). In addition to billing functions, NPA will serve as your liaison to the School Board. NPA will provide the required forms, agreements, and review salary reduction agreements for compliance with I.R.S. regulations.
2. Any/all salary reduction agreement(s) for contribution to the before mentioned plan must be approved as to form and content by the Third Party Administrator. NPA's address is:

National Plan Administrators, Inc.
PO Box 161630
Austin, Texas 78716
Phone: (512) 327-6481
3. Any/all changes to participant's account contributions will be made through the Third Party Administrator.
4. On any changes to an existing account, a properly completed Salary Reduction Agreement must be submitted and approved by the Third Party Administrator before the account change is processed.
5. **ENROLLMENT PERIOD.** Employees may start 403(b) or 403(b)(7) plan at any time, however, the deductions will begin after paper work has been submitted to the TPA and according to TIME FRAME FOR DEDUCTIONS.
6. **TIME FRAME FOR DEDUCTIONS:** All paperwork must be completed and delivered to National Plan Administrators, Inc. on or before the first (1st) of the month in order to effect a salary reduction. Any/all paperwork not completed and delivered to National Plan Administrators, Inc. by the 1st will be included in the following months payroll adjustments. Incomplete paperwork will be returned to the Solicitor.

7. No solicitation on school board property.
8. Agents must sign and abide by guidelines of solicitation.
9. A Product Provider Agreement must be signed by an officer of the soliciting company to indemnify the Board and to be added to the Plan Document.
10. A minimum of 250 applications per company must be completed before a payroll slot is created.
11. The soliciting company shall appoint a full-time career agent who is a resident of or has an office in Jefferson Parish to act as a liaison between the soliciting agent and the current TPA of the Board.
12. Failure on the part of an approved soliciting company to comply with these rules shall immediately result in, but not be limited to, the cessation of that company's right to continue to sell products to employees.
13. Solicitors are to attach a copy of their license to solicit annuities.
14. Solicitors are to provide a copy of each application with the salary reduction agreement and the Disclosure Statement.
15. Solicitors must agree to adhere to the employer's Plan Document.

I do hereby understand and accept the rules and regulations for solicitation in the School System.

(Name of Companies that you can sell for)

(Solicitor – Print Name)

(State License Number)

(Solicitor's Address & Zip Code)

(Solicitor's Telephone Number)

(Solicitor's Fax Number)

(Solicitor's E-mail Address)

(Solicitor's Signature) (Date)

Please Attach a Copy of Your Insurance License