

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

Americo Financial Life & Annuity	www.americo.com	800-634-1181
AXA Equitable Life Insurance Company	www.axa.com/teacher	800-628-6673
Fidelity Security Life Insurance Company	www.fslins.com	800-648-8624
Franklin Templeton Investments	www.franklintempleton.com	800-527-2020
Great American Financial Resources/ Annuity Investors	www.gafri.com	800-789-6771
<ul style="list-style-type: none">• Annuity Investors Life Insurance Company• Loyal American Life Insurance Company• United Teachers Associates Insurance Company• National Health Insurance Company		
Horace Mann	www.horacemann.com	800-999-1030
Industrial Industrial-Alliance Pacific Life (2)	www.insuranceaccountservices.com	866-363-3290
<ul style="list-style-type: none">• As reinsured by Security Benefit		
Mass Mutual Life / C.M. Life	www.massmutual.com	800-366-8226
MetLife Insurance Company	www.metlife.com/mlr	800-236-8489
Midland National Life Insurance	www.midlandannuity.com	877-586-0240
Modern Woodmen of America	www.modern-woodmen.org	800-447-9811
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 Distributor, Inc.	www.oppenheimerfunds.com	800-525-7048
PlanMember as provider for Federated Funds	www.federatedinvestors.com	800-341-7400
PlanMember Services Corporation	www.planmember403b.com	800-874-6910
Primerica Shareholder Services (1)	www.primerica.com	800-544-5445
ReliaStar Life Insurance Company	www.ingretirementplans.com	877-884-5050
RiverSource Life Insurance Company	www.ameriprise.com	800-862-7919
Security Benefit	www.securitybenefit.com	800-888-2461
Symetra Life Insurance	www.symetra.com	877-796-3872
Thrivent Financial	www.thrivent.com	800-847-4836
USAA Investment Management Company	www.usaa.com	800-531-8292
VALIC	www.aigvalic.com	800-448-2542
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: June 22, 2022