

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

Athene USA (2)	www.athene.com	800-800-9882
AXA Equitable Life Insurance Company	www.axa.com/teacher	800-628-6673
Great American Financial Resources	www.gafri.com	800-789-6771
• Annuity Investors Life Insurance Company		
• Loyal American Life Insurance Company		
• United Teachers Associates Insurance Company		
• National Health Insurance Company		
Jefferson National Life	www.jeffnat.com	866-667-0561
New York Life Insurance Company	www.newyorklife.com	800-710-7945

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