

# Tax Shelter Plan Providers (403)b

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| <b>Eligibility:</b>               | <ul style="list-style-type: none"> <li>Faculty and Administrative and Staff (Full Time &amp; Part Time)</li> </ul>                                                                                                                                                                                                                                                                  |
| <b>Contributions:</b>             | <ul style="list-style-type: none"> <li>Contributions are allocated into the account of your choice, established in your name.</li> <li>You decide how to allocate all contributions among the investment funds &amp; providers</li> </ul>                                                                                                                                           |
| <b>How to Enroll and changes:</b> | <ul style="list-style-type: none"> <li>Execute a contract with a provider from the list below</li> <li>Go to <a href="http://my.fiu.edu">my.fiu.edu</a> and fill out the Voluntary Retirement Contribution Form (<i>Human Resources Self Service - Employee Self Service - Employee Resources - Employee Forms - Benefits Forms - Retirement Voluntary Contribution</i>)</li> </ul> |

| Company Name                                    | Agent                                                         | Phone Number                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------|---------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>AXA</b><br>Customer Service: (866) 401- 3030 | Alejandro Gonzalez<br>Andrew Jimenez<br>Jose David Gonzalez   | (305) 332-4420 <a href="mailto:Alejandro.gonzalez@axa-advisors.com">Alejandro.gonzalez@axa-advisors.com</a><br>(305) 670-7616 <a href="mailto:Andrew.jimenez@axa-advisors.com">Andrew.jimenez@axa-advisors.com</a><br>(786) 303-6416 <a href="mailto:Jose.gonzalez3@axa-advisors.com">Jose.gonzalez3@axa-advisors.com</a> |
| <b>FIDELITY INVESTMENTS</b>                     | Customer Service:                                             | (800) 343-0860                                                                                                                                                                                                                                                                                                            |
| <b>MetLife</b>                                  | Richard Akirmaian<br>Customer Service                         | (954) 443-9695 <a href="mailto:rakirmaian@metlife.com">rakirmaian@metlife.com</a><br>(800) 560-5001                                                                                                                                                                                                                       |
| <b>TIAA-CREF</b>                                | Sharon Mohan<br>Hope Glashen<br>Alberto Segovia               | (561)393-1310 <a href="mailto:smohan@tiaa.org">smohan@tiaa.org</a><br>(561)393-1330 <a href="mailto:hope.glashen@tiaa.org">hope.glashen@tiaa.org</a><br>(305)921-6826 <a href="mailto:Alberto.Segovia@tiaa.org">Alberto.Segovia@tiaa.org</a>                                                                              |
| <b>T. ROWE PRICE</b>                            | Customer Service:                                             | (800) 492-7670                                                                                                                                                                                                                                                                                                            |
| <b>VANGUARD GROUP</b>                           | Customer Service:                                             | (800) 662-2003                                                                                                                                                                                                                                                                                                            |
| <b>VOYA / JEFFERSON / SYMETRA</b>               | Kevin Cox<br>Greg Sokolow<br>Alberto Pontonio<br>Local Office | (954)200-9399 <a href="mailto:kcox@gaboragency.com">kcox@gaboragency.com</a><br>(305)761-3532 <a href="mailto:greg@gaboragency.com">greg@gaboragency.com</a><br>(786) 503-2252<br>(305)348-8222; Fax (305)348-8275                                                                                                        |

# Deferred Compensation Plan (457)

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| <b>Eligibility:</b>               | <ul style="list-style-type: none"> <li>Faculty and Administrative and Staff (Full Time &amp; Part Time)</li> </ul>                                                                                                                        |
| <b>Contributions:</b>             | <ul style="list-style-type: none"> <li>Contributions are allocated into the account of your choice, established in your name.</li> <li>You decide how to allocate all contributions among the investment funds &amp; providers</li> </ul> |
| <b>How to Enroll and Changes:</b> | <ul style="list-style-type: none"> <li><b>Enrollments and Changes</b> are processed <b>directly</b> with the vendor</li> </ul>                                                                                                            |

| Company Name                                          | Agent            | Phone Number   |
|-------------------------------------------------------|------------------|----------------|
| <b>Charles Schwab</b><br>(Enrollment with Nationwide) | Customer Service | (888) 393-7272 |
| <b>Empower</b> (Formerly Great West)                  | Customer Service | (800) 444-9412 |
| <b>Nationwide</b>                                     | Customer Service | (800) 949-4457 |
| <b>T. Rowe Price</b>                                  | Customer Service | (800) 893-0269 |
| <b>VALIC</b>                                          | Customer Service | (800) 467-3726 |
| <b>VOYA</b>                                           | Customer Service | (800) 282-6295 |