



School District of Spring Valley
403(b) Salary Reduction Agreement

S1450 County Road CC
Spring Valley, WI 54767
Phone: 715-778-5551
Fax: 715-778-4761

The School District of Spring Valley has authorized the following vendors for participation in the district's 403(b) Tax Sheltered Annuity (TSA) Plan.

Any employee wishing to participate in the district's plan must contact one of the authorized vendors to set up a 403(b) account prior to setting up payroll contributions.

WEA TSA Trust: Bruce Winchester, WEA Member Benefits
bwinchester@weabenefits.com
Direct: 608-416-8682

Aspire Financial (Edward Jones):

Kurtis Brown
kurtis.brown@edwardjones.com
Direct: 715-235-3884

Joel Helminiak
joel.helminiak@edwardjones.com
Direct: 715-309-4811

Horace Mann: Richard (Dick) Krueger
richard.krueger@horacemann.com
Direct: 715-877-2788

Riversource (Ameriprise):

Customer Service
1-800-297-2012
Monday - Friday, 8 AM - 6 PM

Thrivent Financial:

Financial Guidance Team
1-888-834-7437

Joan Bartz
joan.bartz@thrivent.com
Direct: 715-265-4453

If you are interested in participating in the District's 403(b) TSA Plan, please read the Summary Plan Description, complete the Salary Reduction Agreement, and return it to the District Office.

Deductions from your paycheck will fund your 403(b) TSA on a pre-tax basis.