

CORONA PUBLIC SCHOOLS SOLICITORS AGREEMENT

Processing Rules for Solicitors

Corona Public Schools 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 Corona Public Schools 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 Corona Public Schools as the Third Party Administrator for processing the above mentioned accounts. NPA will provide consolidated billing service to the Public School and disburse payments to all providers within 2 business days after receipt of payment from the Public School (holidays and weekends excluded). In addition to billing functions, NPA will serve as your liaison to the Public School. 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. The TSA Hold Harmless Agreements provided by NPA are required. The Solicitor must have the Provider sign a Hold Harmless Agreement; no payroll deductions will be honored without a signed agreement.
4. Any/all changes to participant's account contributions will be made through the Third Party Administrator.
5. A Disclosure Statement must be completed on any additions or changes of account contributions by an employee. The Disclosure Statement must be signed by the employee and the solicitor. On any new or changes to an existing account, a properly completed salary reduction agreement must be submitted to and approved by the Third Party Administrator before the account is processed.
6. **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.
7. **TIME FRAME FOR DEDUCTIONS:** All paperwork must be completed and delivered to National Plan Administrators, Inc. on or before the twentieth (20th) of the month in order to effect a salary reduction for the next month. Any/all paperwork not completed and delivered to National Plan Administrators, Inc. by the 20th will be included in the next available months payroll adjustments. Incomplete paperwork will be returned to the Solicitor.

8. Solicitors will not be allowed to make presentations to campus personnel on campus during normal school hours. Solicitors are not permitted to make phone calls to employees during normal school hours. An employee may meet with a Solicitor on school property outside of the employee's workday. Solicitors must check in with the principal's office upon arrival prior to meeting with a school employee. Solicitors must obtain prior approval from the principal before proceeding on any campus.
9. Solicitors are to attach a copy of their state insurance license to solicit annuities.
10. Solicitors are to provide a copy of each application with the salary reduction agreement and the Disclosure Statement.
11. 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 Corona Public Schools.

(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 License