

Appendix 1

Authorized vendors under the Castleberry ISD 403(b) plan are:

ASpire Financial Services (1)	www.403bplan.info	866-634-5873
AXA Equitable Life Insurance Company	www.axa.com/teacher	800-628-6673
Foresters Financial (formerly First Investors)	www.forestersfinancial.com	800-423-4026
Great American Financial Resources	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		
GWN Marketing (1)		800-695-1471
Horace Mann	www.horacemann.com	800-999-1030
Industrial-Alliance Pacific Life (2)	www.insuranceaccountservices.com	866-363-3290
<ul style="list-style-type: none">• As reinsured by Security Benefit		
Jefferson National Life Insurance	www.jeffnat.com	866-667-0561
Lincoln Financial Group	www.lfg.com	800-454-6265
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
Oppenheimer Funds Distributor, Inc.	www.oppenheimerfunds.com	800-525-7048
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
Transamerica Life (2)	www.oneamerica.com	800-317-2688
<ul style="list-style-type: none">• As administered by American United Life		
VALIC	www.aigvalic.com	800-448-2542
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: July 26, 2016

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