TAX SHELTERED INVESTMENT PROGRAMS

The Board of Education has authorized the following investment carriers for the district.

COMPANY/AGENCY	CONTACT	PHONE
AIG Valic (403b and 457)	Marguerite Tschirhart	800.892.5558 Ext. 87343
MAXIMUS wealth management (FTJ Fundchoice) (403b and 457)	Andrew McCulloch	248.533.0171
Consolidated Financial Corp.	Susan Morse	248.423.4242
Eschels Financial Group (Proequities)	Dan Haddad	248.644.1144
M3 Investment Services (The Legend Group) (403b and 457)	Timothy J. Madigan	888.844.7872
Massachusetts Mutual /Oppenheimer	Ron Hebert Jason Tether Ellen Zimmermann	248.208.2775 248.208.2770 248.208.2771
Metropolitan Life	Jeffrey Hollifield	586.764.0648
MEA Financial Services (Paradigm Equities) (403b and 457)	Ronald Keoleian	248-659-8777
The Vanguard Group	not applicable	800.662.2003

You are encouraged to carefully study the literature of any company in which you are interested. Further, you should seek the advice of a professional accountant, tax consultant or financial planner before investing money with any company. The Board of Education assumes no responsibility for nor makes any representation concerning the suitability of any company for investment purposes or the tax treatment of employees of the purchase of annuity contracts.

LJG/kgr 05/02/16

LAWRENCE GALLAGHER, DEPUTY SUPERINTENDENT, FINANCE, FACILITIES, AND OPERATIONS
ADMINISTRATIVE OFFICES - AVERY CENTER
14700 W. LINCOLN
OAK PARK, MI 48237
P: 248-837-8028 F: 248-544-5835

COMMISSION ON ACCREDITATION AND SCHOOL IMPROVEMENT NCA Accredited