



# Mt. San Antonio College

## Health Benefits Office

### Tax Shelter Annuities

**Bulletin #3.13 – March 6, 2011**

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## REMINDER:

### Tax Shelter Annuities (TSA)

The Benefits office has recently received several inquiries from the campus about phone calls from vendors in regards to setting up a 403(b) or 457 TSA account.

Please be advised, Mt. SAC does business with School's First Credit Union and District-approved Tax Shelter agents only. Inquiries made from non-District-approved tax shelter agents should be redirected to School's First Credit Union.

**WARNING:** Be cautious of inquiries seeking personal information (i.e., social security numbers, dates of birth, etc.) over the phone.

Our School's First representative is:

**Ryan Lozano**

**800-462-8328 ext. 8423**

For a list of School's First approved vendors:

<https://retirement.schoolsfirstfcu.org/SchoolEmployees/ApprovedProviderList/403bProviders.aspx>

If you have any questions, please contact:  
Karen Pilling (L-Z) ext. 5478 or Hawk Yao (A-K) ext. 5522