

**MORRIS HILLS REGIONAL DISTRICT
APPROVED TAX SHELTER PROVIDERS**

Morris Hills Regional District Board of Education has approved the following providers to offer traditional 403b, 457 and Roth accounts for its employees. To open new accounts, employees may contact the following companies directly, use their own financial advisor or use the MHRD representative and then complete an OMNI Salary Reduction Agreement (SRA). Employees with established accounts who wish to make changes to their contribution must complete an OMNI Salary Reduction Agreement (SRA). OMNI Salary Reduction Agreements and additional information can be found on The Omni Group ("OMNI") website at www.omni403b.com.

TAX SHELTER

MHRD REPRESENTATIVE

Equitable L.I.C.

Paul Santos
Paul.santos@axa-advisors.com
908-421-1705

Lincoln National L.I.C.

Rachel Geueke
Rachel.geueke@lfg.com
973-989-9162

Lincoln Investment Planning*

Pat Romano/Jonathan Peck
promano@lincolninvestment.com
jpeck@lincolninvestment.com
877-917-4001/800-627-0067

The Legend Group*

Alan P. Curley
alancurley@legendequities.com
201-874-8723/800-735-9395

Variable Annuity L.I.C.

Kevin R. Walker
Kevin.walker@valic.com
(800) 892-5558 ext. 89760
917-968-6333

Metlife

Damien Paumi
dpaumi@nisivoccia.com
973-328-1825

Mass Mutual Financial Group

Dan Katzeff
dkatzeff@financialguide.com
973-237-4337

Aspire Financial Services*

866-634-5873
info@Aspireonline.com

Security Benefit

Craig S. Frisch
845-304-9373
Craig.Frisch@SecurityBenefit.Com

TAX DEFERRED MUTUAL FUNDS 403(b)7

Employees may also establish new 403(b)7 accounts with American Funds, T. Rowe Price and Vanguard which are not directly available, but may be purchased through a platform company. Service providers marked with an asterisk are Platform Companies.