

**New Prague Area Schools #721**  
**403(b) & 457 Plan Options/Contact Info**

<u>SERVICE PROVIDER</u>	<u>PLAN TYPE</u>	<u>PRODUCTS</u>	<u>FINANCIAL ADVISORS</u>
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1) <b>*403bASP</b>	403(b)	(Options of several Mutual Fund families)	See back page
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\*\* [www.403bplan.info](http://www.403bplan.info)

1-866-543-0760 (Employee Line)

2) <b>*Fidelity Direct</b>	403(b)	(Fidelity's family of Mutual Funds)	
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**NOTE – it is possible to work with an advisor to access the Fidelity Direct plan, but this is NOT the Fidelity Advisor plan.**

**\*Option to manage funds without a financial advisor**

**\*\*Bring to meeting with your advisor unless you choose to self administer**

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3) <b>VALIC</b>	403(b)/457	(Annuity Products, some Mutual Funds)	Greg Burkhardt
			800-892-5558 Ext. 87585
			952-250-9635 (Cell)

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<b>457 Plans Only</b>			Bill Williams
<b>Great West</b>	457		952-473-8311
<i>(National Benefits (NBI)</i>			
MN Deferred Comp Plan			

**FINANCIAL ADVISORS<sup>1</sup>****PHONE**

Dan Bishop	Wells Fargo Investments	952-758-8372
Shannon Brusseau	Investment Solutions at Roundbank	952-758-7526
Sheri Hotzler	Edward Jones Investments	952-447-1330
Craig Hutchinson	Five Star Financial Resources	952-440-5287
Bob Karkoska	Pratt, Kutzke & Associates	507-388-0770 Or: 800-390-0770
Josh Miller	Edward Jones Investments	952-758-6235
Ron Schoenecker	Farmers Financial Solutions	952-758-2879
Bill Simonette	Diversified Financial Services	507-345-8354
Tom Tollefson	AXA Advisors	763- 482-9171
Diane Weyrick	DMW Financial	952-758-7140
Paul Wilson	ING Financial Partners	651-483-1912

1 Please note – the list of advisors is NOT an exclusive list. You may work with any advisor of your choice who can assist you with investing with one of the above-listed companies.