

Ontario Local School District

Annuity List - Effective August 1, 2011

Listed below are the current annuity companies available to all Ontario employees. In order to acquire a new company, there must be five (5) individuals interested in the same company. The new company must also fill out an Information Sharing Agreement and be a member of VOYA Plan with Ease Program. (These forms will be sent to the new company by the Ontario Treasurer.) Any questions, please contact the Treasurer's office at 747-4311.

Annuity Company	Plan #	Agent	Web-site	Phone Number	Code	Type
Ameriprise Financial	104836	M Roberts	www.ameriprise.com	419-521-4406	510	403b
Great American Life Ins. Co (GALIC)	00H986	J Alker	www.gafri.com	419-523-9022	514	403b
VOYA Financial	VT4864	Dan Jacobs	www.voyaretirement.voyaplans.com	800-552-2181 Ext#4023746	521	403b
VOYA Financial - Reliastar	VT4864	Dan Jacobs	www.voyaretirement.voyaplans.com	800-552-2181	504	403b
Legend Group	578	Rhonda McCurry	www.midwestlegendgroup.com	800-417-9099 ext.# 116	520	403b
Massachusetts Mutual Life	A0073	No Agent	www.massmutual.com	800-272-2216	519	403b
Met Life	0828025	No Agent	www.metlife.com	800-648-5433	524	403b
Modern Woodmen of American	21244906001	G Boyce	www.modern-woodmen.org	419-529-5827	527	403b
Oppenheimer Funds	075570	R Thauvette	www.oppenheimerfunds.com	419-342-7140	511	403b
VOYA - Roth 403(b)	VT4864	Dan Jacobs	www.voyaretirement.voyaplans.com	800-552-2181 Ext# 4023746	608	403b

457 Plans

VOYA - OASBO	VFL213	Dan Jacobs	800-552-2181 ext# 4023746	526	457
Ohio Deferred Comp	680200	Stan Mories	419-560-0644 or 877-644-6457	529	457
Plan Name	Type	Phone Number	Code	Annuity Type	
MMO - Flex Save - Health	FSA	800-525-9252	532	Section 125	
MMO - Flex Save - Dependent	FSA	800-353-9946	537	Section 125	
Pre-Paid Legal Services	Service	800-464-2266	617	Regular Ins.	
TrustMark Accidental Insurance	Insurance	800-514-3466 ext:45429	628	Regular Ins.	

In-active plans: American Funds, Fidelity Life Insurance, Merrill Lynch, Pioneering State Farm and Western Reserve Life - Effective Jan 2009. Rev 12/2016

Word/Forms/Annuity List