

Supplemental Retirement Plans: Tax Sheltered Annuity (403B) Vendors and Wisconsin Deferred Compensation (457)*

To sign up for a TSA: Contact your vendor(s) of choice and request a 403(b) start-up kit/application. Submit the vendor application(s), beneficiary designation, and Salary Reduction Agreement (SRA) to UWHC Human Resources mail drop 2409 to authorize deferrals to your chosen vendor(s). Include the account # on the application.

When setting up an account, be sure to identify yourself as a UW Hospital and Clinics employee, and not a UW employee.

TSA (403b) - Mutual Funds Companies:

Dreyfus Service Corporation
Dreyfus Group Retirement Plans
(800) 358-2595
144 Glen Curtiss Blvd
Uniondale, NY 11556-01444
(800) 358-9505
<http://www.dreyfus.com>

TIAA-CREF
TIAA - CREF
730 Third Ave.
NY, NY 10017
(800) 842-2776
<http://www.tiaa-cref.org>
Acct # M491

Fidelity Investments
Fidelity Investments
P.O. Box 770002
Cincinnati, OH 45277-0089
(800) 343-0860
<http://www.fidelity.com>
Acct # 69740

TSA (403b) - Life Insurance Companies:

American United Life
National Financial Resources
250 S. Executive Dr
Brookfield, WI 53005-4273
(262) 780-1250
(800) 249-6269
<http://www.eretirement.aul.com>
Acct # C30603

T. Rowe Price
Retirement Operations Group
P.O. Box 17479
Baltimore, MD 21298
(800) 638-3804
<http://www.troweprice.com>
Acct # 102520

Ameriprise
Ameriprise
575 D'Onofrio Dr., Suite 100
Madison, WI 53719
(608) 833-4437
<http://www.americanexpress.com/advisors>
Acct # 658224

Wells Fargo (formerly Strong Funds)
Wells Fargo Funds
P.O. Box 2936
Milwaukee, WI 53201
(800) 368-1470
<http://www.wellsfargo.com>
Acct # 39-1835630

Life Insurance Companies (con't):

Lincoln National Life
Lincoln Financial Group
406 Science Dr, Suite 100
Madison, WI 53711-1097
(608) 231-2231
(800) 967-2046
<http://www.lincolnlife.com>

Wisconsin Deferred Compensation (457):
Submit application directly to WDC:
5325 Wall St., Suite 2755
Madison, WI 53718
(877) 457-9327
<http://www.wdc457.org>

Madison office Web site:
<http://www.wisconsinfinancialplanners.com>

*UWHC Authority Employees are eligible for TSA (403b) and WDC (457)

*UWHC Board Employees are eligible for WDC (457)