

ANNUITIES

Enrollments, changes, and cancellations can be done each month. The Wenatchee School District Salary Reduction Agreement must be completed by the employee and an authorized annuity representative. Forms must be received by the payroll department by the 10th of the month.

To start a new annuity we must have 5 employees' sign Salary Reduction Agreements for the new 403(b) annuity and the provider must have signed the districts Provider Agreement Form.

Tax Sheltered Annuities

Life of the Southwest
Met Life
New York Life
Oppenheimer Funds
Mid Atlantic Trust
Security Benefit
WEA Plans (VALIC)

Tax Sheltered Annuity Representatives who can sell you the annuities listed above:

Allstate Financial Services
Larry Hoven
2351 N Mission Ave
Wenatchee, WA 98801
664-4000

CGC Financial Services
5 Centerpoint Suite 270
Lake Oswego, OR 97035
503-670-1958

CNC Financial Group
Steve Bogen
175 E Penney Rd
Wenatchee, WA 98801
888-0430

D.A. Davidson & Co.
Robert Johnson II
630 N Chelan, Suite B2
Wenatchee, WA 98801
664-9063

WEA TSA Investments
Thomas L McNair
10 First Street, Suite 122
Wenatchee, WA 98801
662-4443

Financial Alternatives
Gene Hoon, Julie Hoon
Ralph Peterson, Eric Peterson
610 N Mission, Suite A-6
Wenatchee, WA 98801
663-7526

Financial Alternatives
Ford Barrett
900 N Mission Suite A
Wenatchee, WA 98801

Mass Mutual Financial Group
Eric J Anderson
2900 N Nevada St.
Spokane, WA 99207

Smith Barney
Curt Harvey, Darren Goehner
18 S Mission Street, Suite 101
Wenatchee, WA 98801