

ASHWAUBENON SCHOOL DISTRICT
1055 Griffiths Lane
Green Bay, WI 54304-5599

From: Jody Smits, Human Resources Coordinator
To: Employees of the Ashwaubenon School District
Date: January, 2024
RE: 403(b) or 457

The Ashwaubenon School District offers to its employees, participation, at their will, in a 403(b), 403(b) Roth or 457 savings plan. The following two vendors have agreed to participate in our plan and will be able to assist you in setting up your savings plan. Both vendors provide a 403(b) and a 403(b) Roth plan, but only The Standard provides a 457. If you wish to enroll in either of these plans, please contact one of the following providers;

The Standard

KerberRose Retirement Plan Service (local administrator)

Anthony J. Powers

117 E. Fifth Street, Shawano, WI 54166

Shawano: 715-524-6626

Green Bay: 920-434-7310

Fax: 800-758-7659

Anthony.powers@kerberrose.com

WEA Trust

Retirement and Investment Services

Shobi Samuel

660 John Nolen Drive, Madison, WI 53713

(608) 709-4492

SSamuel@weabenefits.com

After you have contacted one of the above vendors and have set up an account with them, please complete the District's Salary Reduction Agreement form and forward to the District's Human Resources department.

For any changes to your contribution amount in the future, please complete a new Salary Reduction Agreement form and return to the District with a two week notice.

We encourage you to learn more about your savings opportunities and to participate in our retirement savings program.