

Tax Sheltered Annuity Universal Notification

Tuesday, October 27, 2009

Wednesday, October 28, 2009

District Office-Education Ctr Room B

3:30 p.m. - 4:30 p.m.

On August 27, 2007, the East Whittier City School District entered into an agreement with SchoolsFirst Federal Credit Union (previously known as "OCTFCU"). As our third-party administrator (TPA) they assist the District with the additional administrative responsibilities placed on the District by the Internal Revenue Service. IRS made significant changes to IRC 403(b) that went into effect on January, 2008. IRC 403(b) is the IRS code that governs governmental agencies' tax sheltered annuity and/or deferred compensation plans (TSA plans).

One of the services provided by our TPA is to conduct employee information meetings to meet the universal notification requirements of IRC 403(b). *You are cordially invited to join us at a workshop to learn about your retirement plan options. The presentation will start at 3:30 p.m. on each day and will allow for Questions & Answers afterwards.*

If you have any questions, please call the Payroll Department at ext. 5955 (Certificated) or 5956 (Classified).

If you have any TSA questions, please call Adam Koyanagi of SchoolsFirst FCU at (800) 462-8328 ext. 8673.