

# *Parsippany-Troy Hills Township Schools*

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*Robin C. Tedesco  
Interim Business Administrator/  
Board Secretary*

*P.O. Box 52  
Parsippany, New Jersey 07054-0052  
(973) 263-7200 ext. 7209  
e-mail: rctedesco@pthsd.k12.nj.us*

## MEMORANDUM

TO: All Staff  
FROM: Robin C. Tedesco, Interim Business Administrator  
DATE: August 2022  
RE: 403(b) Retirement Plan  
457(b) Retirement Plan

Effective August 2014, The OMNI Group became the district's Plan Administrator for all 403(b)/457(b) plans. This change will allow you to make transactions to your plan ***throughout the year not just during open enrollment.***

OMNI is a leading 403(b) Administrator and will take on the responsibility to ensure that the district, its employee participants, and each of our investment providers and their agents adhere to the many compliance regulations issued by the IRS.

OMNI will service all transactions throughout the year such as contributions, distributions, loan applications, etc.

Please see the attached 403 (b) and 457 (b) Universal of Availability Notice and list of Board Approved Tax Shelter Annuity Companies.

You may contact OMNI by visiting their website at [www.omni403b.com](http://www.omni403b.com) or by phone at (877)544-6664.

PARSIPPANY-TROY HILLS BOARD OF EDUCATION TAX SHELTERED ANNUITY COMPANIES

403(b) BROKERS (updated August 2022)

Aspire Financial Services	Agent:	Aaron Skloff Skloff Financial Group 105 Wentworth Drive Berkeley Heights, NJ 07922	908-464-3060 908-531-6422 © <a href="mailto:askloff@skloff.com">askloff@skloff.com</a>
		Donna Brower Allied Wealth Partners 14 Walsh Drive, Suite 100 Parsippany, NJ 07054	973-265-1268 973-214-8531 © <a href="mailto:dbrower@alliedwealthpartners.com">dbrower@alliedwealthpartners.com</a>
Brighthouse (formerly MetLife CT/Travelers)	Agent:	Nancy Clemente MetLife Solutions Group 65 Jackson Drive, Suite 300 Cranford, NJ 07016	844-258-1328 <a href="mailto:nclemente@financialguide.com">nclemente@financialguide.com</a>
Equitable (formerly AXA) 403(b) & ROTH	Agent:	Alan Friedman Equitable Advisors, LLC 333 Thornall Street, 8th Floor Edison, NJ 08837	732-452-6918 <a href="mailto:Alan.Friedman@equitable.com">Alan.Friedman@equitable.com</a>
		Michael Bassett TPS Financial 280 Bloomfield Ave., Suite 1 Verona, NJ 07044	732-452-7289 <a href="mailto:Mbassett@tpsfinancial.com">Mbassett@tpsfinancial.com</a>
		Brian Trause Equitable Advisors, LLC 501 Broadway Point Pleasant, NJ 08742	732-701-0024 <a href="mailto:Brian.Trause@equitable.com">Brian.Trause@equitable.com</a>
Lincoln Financial Advisors (formerly Lincoln National Insurance)	Agent:	Al Mashnouk Rachel Geueke Lincoln Financial Advisors Corp. 3175 Route 10, Suite 300B Denville, NJ 07834	973-989-9162 <a href="mailto:rachel.geueke@lfg.com">rachel.geueke@lfg.com</a>
Lincoln Investment Planning 403(b) & ROTH	Agent:	Jeffrey Faller The Faller Company, LLC 107 South Ave West, Suite 2A Cranford, NJ 07016	908-276-1400 <a href="mailto:jfaller@lincolninvestment.com">jfaller@lincolninvestment.com</a>
		Patrick Bergin The Bergin Agency 31 South Ave West Cranford, NJ 07016	908-276-1181 <a href="mailto:pbergin@lincolninvestment.com">pbergin@lincolninvestment.com</a>
		Jonathan Peck The Bergin Agency 31 South Ave West Cranford, NJ 07016	908-276-1181 <a href="mailto:jpeck@lincolninvestment.com">jpeck@lincolninvestment.com</a>
MetLife	Agent:	Chris Hasselgren Force Financial Associates 78-80 Main Street, Suite 6 Madison, NJ 07940	973-993-0975 <a href="mailto:chris@ffallc.com">chris@ffallc.com</a>
Security Benefit/ NEA Retirement Program	Agent:	Matt Monahan Denville, NJ	973-588-3475 <a href="mailto:matt@myturningpointe.com">matt@myturningpointe.com</a>
		Sara Scholl Basking Ridge, NJ	973-585-4399 <a href="mailto:sara@myturningpointe.com">sara@myturningpointe.com</a>

## PARSIPPANY-TROY HILLS BOARD OF EDUCATION TAX SHELTERED ANNUITY COMPANIES

### 457 BROKERS - (updated August 2022)

Aspire Financial Services	Agent:	Aaron Skloff Skloff Financial Group 105 Wentworth Drive Berkeley Heights, NJ 07922	908-464-3060 908-531-6422 © <a href="mailto:askloff@skloff.com">askloff@skloff.com</a>
		Donna Brower Allied Wealth Partners 14 Walsh Drive, Suite 100 Parsippany, NJ 07054	973-265-1268 973-214-8531 © <a href="mailto:dbrower@alliedwealthpartners.com">dbrower@alliedwealthpartners.com</a>
Brighthouse (formerly MetLife CT/Travelers)	Agent:	Nancy Clemente MetLife Solutions Group 65 Jackson Drive, Suite 300 Cranford, NJ 07016	844-258-1328 <a href="mailto:nclemente@financialguide.com">nclemente@financialguide.com</a>
Equitable (formerly AXA)	Agent:	Alan Friedman Equitable Advisors, LLC 333 Thornall Street, 8th Floor Edison, NJ 08837	732-452-6918 <a href="mailto:Alan.Friedman@equitable.com">Alan.Friedman@equitable.com</a>
Lincoln Financial Advisors (formerly Lincoln National Insurance)	Agent:	Al Mashnouk Rachel Geueke Lincoln Financial Advisors Corp. 3175 Route 10, Suite 300B Denville, NJ 07834	973-989-9162 <a href="mailto:rachel.geueke@lfg.com">rachel.geueke@lfg.com</a>
Lincoln Investment Planning	Agent:	Jeffrey Faller The Faller Company, LLC 107 South Ave West, Suite 2A Cranford, NJ 07016	908-276-1400 <a href="mailto:jfaller@lincolninvestment.com">jfaller@lincolninvestment.com</a>
		Patrick Bergin The Bergin Agency 31 South Ave West Cranford, NJ 07016	908-276-1181 <a href="mailto:pbergin@lincolninvestment.com">pbergin@lincolninvestment.com</a>
		Jonathan Peck The Bergin Agency 31 South Ave West Cranford, NJ 07016	908-276-1181 <a href="mailto:jpeck@lincolninvestment.com">jpeck@lincolninvestment.com</a>
MetLife	Agent:	Chris Hasselgren Force Financial Associates 78-80 Main Street, Suite 6 Madison, NJ 07940	973-993-0975 <a href="mailto:chris@ffallc.com">chris@ffallc.com</a>
Security Benefit/ NEA Retirement Program	Agent:	Matt Monahan Denville, NJ	973-588-3475 <a href="mailto:matt@myturningpointe.com">matt@myturningpointe.com</a>
		Sara Scholl Basking Ridge, NJ	973-585-4399 <a href="mailto:sara@myturningpointe.com">sara@myturningpointe.com</a>