

SCHOOL DISTRICT OF WAUPACA
403(b) TAX SHELTERED ANNUITY OPTIONS

COMPANY	AGENT CONTACT
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Fidelity 82 Devonshire St. Boston, MA 02109 (617) 572-7000 / (800) 544-4774 Company # 60192	<ul style="list-style-type: none"> • Call Company Direct – Employee Services (800) 343-0860 • Suzanne S. Udoni & Eric P. Spindt Financial Advisor/Certified Retirement Counselor Waypoint Financial Solutions, Inc. 102 Water Street, Waupaca, WI 54981 (715) 258-8822 www.mywaypoint.net sudoni@mywaypoint.net espindt@mywaypoint.net
Franklin Templeton Trust Co. 700 Central Ave. P.O. Box 33030 St. Petersburg, FL 33701 (813) 823-8712 / (800) 237-0738	<ul style="list-style-type: none"> • Edward Jones - Ben Durfee, Investment Rep., Waupaca, WI 54981 (715) 258-2158 • Edward Jones – Pete Vanden Bush, Investment Rep., Waupaca, WI 54981 (715) 256-1382 • Jeff Diehl, Appleton, WI (920) 730-3400 / (800) 381-2381 (Fax (920) 730-3418) www.advisorygrp.com / jpd@advisorygrp.com • Gary E. Janssen Accounting & Tax Service, Inc., Waupaca, WI 54981 (715) /258-3325 / (800) 383-2126 • Susan McNamara, FSB Investment Services Farmers State Bank, 112 W. Fulton Street, Waupaca, WI 54981 (715) 258-1400 • Michael Versteegen, LPL Financial, 4830 N. Ballard Rd., Appleton, WI 54913 (920) 882-4781 • Mitch Nonn, Primerica Financial Services 2390 W. Nordale Drive, Unit B, Appleton, WI 549119 (920) 460-9817 • Suzanne S. Udoni & Eric P. Spindt Financial Advisor/Certified Retirement Counselor Waypoint Financial Solutions, Inc. 102 Water Street, Waupaca, WI 54981 (715) 258-8822 www.mywaypoint.net sudoni@mywaypoint.net espindt@mywaypoint.net

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<p>WEA Tax Sheltered Annuity Trust P.O. Box 7338 Madison, WI 53707-7338 Unit No. 0308.0 (608) 276-4000 / (800) 279-4030</p>	<ul style="list-style-type: none">• Please contact the School District of Waupaca District Office and ask for a WEA 403b Packet