

MORRIS HILLS REGIONAL DISTRICT
APPROVED TAX SHELTER PROVIDERS

Morris Hills Regional District Board of Education has approved the following providers to offer traditional 403b, 457 and Roth accounts for its employees. To open a new account, employees may contact the following companies directly, use their own financial advisor or use the MHRD representative and then complete an OMNI Salary Reduction Agreement (SRA). Employees with established accounts who wish to make changes to their contribution must complete an OMNI Salary Reduction Agreement (SRA). OMNI SRA and additional information can be found on The OMNI Group website at www.omni403b.com.

TAX SHELTER	MHRD REPRESENTATIVE
Equitable formerly AXA	Paul Santos psantos@tpsfinancial.com 908-421-1705
Lincoln National L.I.C.	Rachel Bernard rachel.bernard@lfg.com 973-989-9162
Lincoln Investment Planning*	Pat Romano/Jonathan Peck promano@lincolninvestment.com jpeck@lincolninvestment.com 877-917-4001 / 908-276-1181
The Legend Group*	Alan P. Curley alan@sfs-fp.com 201-874-872 / 973-316-6058
Corebridge Financial formerly AIG VALIC	Anthony Sambrato 973-229-9046
Metlife	Damien Paumi dpaumi@nisivocciawealth.com 973-298-8511
Mass Mutual Financial Group	Dan Katzeff dkatzeff@financialguide.com 973-535-3181
Aspire Financial Services*	Katrina Gambrell katrina.gambrell@aspireonline.com 866-634-5873
Security Benefit	John Bannan john.bannan@abmmfinancial.com 201-660-7779 / 551-795-7402

*TAX DEFERRED MUTUAL FUNDS 403(b)7

Employees may also establish new 403(b)7 accounts with American Funds, T. Rowe Price and Vanguard which are not directly available, but may be purchased through a Platform Company. Service providers marked with an asterisk are Platform Companies.

UPDATED 3/14/24