



TO: New Employee
FROM: Waconia Public Schools' Payroll Office
RE: 403(b) Plan

Eligible employees who work **(20) or more hours per week** have the opportunity to enroll in the Waconia Public Schools—ISD 110 403(b) Plan with one (1) or more of the following vendors and financial advisors:

- **Ameriprise Financial**
Mr. Daniel Harris
9362 Oak Avenue
Waconia, Minnesota 55387
Telephone: (952) 841-8159
Facsimile: (952) 442-4085
Email: daniel.j.harris@ampf.com
<https://meet-lauren.timetap.com/>
- **Educators Financial Services, Inc.**
Mr. Patrick "PJ" Scherven
4349 Wilshire Boulevard
Mound, Minnesota 55364
Telephone: (612) 490-4024
Facsimile: (763) 315-3417
Email: pjs@efsadvisors.com
- **VOYA**
Lauren Koschmeder, Voya Financial Advisors
10800 Lyndale Ave S, Suite 200
Bloomington, Minnesota 55420
Telephone: (612) 887-3903
Facsimile: (612) 445-7667
Email: lauren.koschmeder@voyafa.com
Schedule an appointment:
- **Horace Mann**
Gretchen Rehm
500 Marschall Road S. #205
Shakopee, Minnesota 55379
Telephone: (866) 405-9915
Email: gretchen.rehm@horacemann.com
- **Thrivent**
Martin Cole, Chad Henke, Peter Hess
129 W Main St
Waconia, MN 55387
Telephone: (952) 442-8461
www.thrivent.com
- **Edward Jones – Waconia Offices**
Dale Copeman (952) 442-1398
Susan Pauling (952) 442-1668
Ryan Pederson (952) 442-1016
Margaret Runke (952) 442-4524
www.edwardjones.com

If you wish to have a tax-deferred payroll deduction from one of the aforementioned vendors/financial advisors, please submit a Salary Reduction Agreement to the district's Payroll Office. The Salary Reduction Agreement must be signed by both the financial advisor and the employee.