



## University Medical Center

You are eligible to participate the start of the pay period **after** 90 days of employment.

**Accounts must be established & open before payroll deductions begin. You must call or enroll online with one of the following companies prior to enrolling in Workday.**

Employees may change funding accounts at any time.  
 Balance transfers require approval of a rollover request.

### Tax-Sheltered Annuity (TSA) Retirement Accounts

403(b) & Roth Accounts	Company	Representative
Aspire Financial Services	Edward D Jones Company 6102 Chicago Ave, Suite 200 Lubbock, TX 79424	Mr. Kyle Motheral (806) 783-3072
Lord Abbett	Peak Wealth Advisors 6000 Greenwood Plaza Blvd, Suite 100 Greenwood Village, CO 80111	Mr. Garry Kirkland (303) 268-2213
Primerica	Primerica Financial Services 3318 83rd St, Suite 400 Lubbock, TX 79423	Mr. Arnold Hall (806) 785-5959
Vanguard	Vanguard P.O. Box 534044 St. Petersburg, FL 33747	Participant Services (800) 569-4903
457 Accounts	Company	Representative
Nationwide Retirement Solutions	Nationwide Retirement Solutions P.O. Box 182797 Columbus, OH 43218	Mr. Jim Hammock (806) 441-6069

TSA MATCHING	
LENGTH OF SERVICE	% OF ELIGIBLE CONTRIBUTIONS MATCHED
90 days to 5 years (3-60 months)	2%
6-8 Years (61-96 months)	3%
9-11 Years (97-132 months)	4%
12-15 Years (133-180 months)	5%
16-20 Years (181-240 months)	6%
21-25 Years (241-300 months)	7%
26+ Years (301+ months)	8%