

Recap: 403 B Compliance Meeting
June 30, 2008
District Office

Two presenters were invited to attend:

Great American-Presenter-Buz Stocking, Twin Falls Idaho

American Fidelity-Steve Call-Karla Edwards-Spokane, Washington

Each reviewed compliance deadlines and plan administration. Loans, hardship distributions, transfers and rollovers for the 403 B plans were discussed and the administration thereof. Each presenter was asked a series of questions relating to the 403 B compliance.

Mr. Stocking was informative but did not have the ready answers that we were looking for. Ms. Edwards and Mr. Call were very well versed in the new law. They had their compliance officer on line for us to question, when we had a technical question that Ms. Edward and Mr. Call were unable to answer.

After review of the information that was presented, the committee unanimously determined that American Fidelity would serve the district best.