



Executive Summary Finance Committee Meeting

DATE: November 20, 2025

TOPIC: Adding Vanguard to SD74's SRA Offerings

PREPARED BY: Courtney Whited

Recommended for:

- ☐ Action
- ☒ Discussion
- ☒ Information

Purpose/Background:

The SD74 Business Office learned that the District's third party administrator of employees' supplemental retirement accounts, Omni TSA Consulting Group, could easily add Vanguard to the roster of vendors that provide supplemental retirement accounts.

The difference between Vanguard and other investment providers is the "do-it-yourself" model that offers little to no assistance from financial advisors along the way.

Fiscal Impact:

The fiscal impact would occur for those employees who opt to use Vanguard directly.

Please review the attached sample letter to employees drafted by Omni/TSA Consulting Group.

Recommendation:

This summary is for informational purposes. The Administration requests direction from the Finance Committee on next steps.