

Paragraph for Board Memo:

John Beachey of TJ Stearns requested the following records:

- “1) A list of the current carriers admitted for establishing 403(b) salary reductions in the district (i.e. Valic, Fidelity, Oppenheimer Funds).
- 2) Name of current TPA (Third Party Administrator) if using one.
- 3) A copy of the hold harmless or service provider agreement to which your school district binds the 403(b) carriers (if none exists, then so state).
- 4) Any other legal documents requiring signature from 403(b) vendors and/or participants (i.e. salary reduction agreements).
- 5) Written notice of the district’s requirements for carrier status (i.e. minimum number of clients, board/union approval).
- 6) A directory of employees in the district (if none exists, then a roster of personnel in each building would be sufficient).
- 7) Any guidelines the administration has set forth for carriers to speak with employees of the district (i.e. many districts allow vendors to provide lunch to staff members in the lounge area of the buildings).”

This commercial FOIA request was received October 20, 2015 and responded to on November 16, 2015. It took two District employees a total of 2 hours and 10 minutes (\$57.68) to respond to this FOIA request. Total attorney time equaled 0 hours (\$0).