

Inactive ORP/TDA Vendor Compliance

Employees currently contributing to inactive vendors who are not on the approved vendor list may continue contributing to these vendors as long as the vendor *will* comply with the new IRS 403(b) regulations. Employees contributing to vendors who *will not* comply with the new regulations will be required to move future contributions to a vendor on the approved list located at <http://www.tamus.edu/benefits/retirement/orptda.html> by December 12, 2008. However, they will not be required to transfer their existing account balance to the new vendor.

***This is a comprehensive list** — (last updated 11/24/08)

*Vendors who **will comply** with IRS regulations and information sharing requirements:*

- Security Benefit (ORP 024, TDA 059)
- USAA (ORP 023, TDA 043)
- AXA Equitable (ORP 022, TDA 056)
- Great American Life Insurance Company (ORP 049, TDA 152)
- Plan Member Services (TDA 004)
- American Century (ORP 030, TDA 161)
- Life Insurance Company of the Southwest (ORP 065, TDA 189)
- Jefferson National Life Insurance Company (ORP 029, TDA 106)
- ISC Group (ORP 015, TDA 015)
- Commonwealth Annuity (formerly Chase & Kemper) (ORP 046, TDA 145)
- Metropolitan Life Insurance Co. (ORP 007, TDA 046)
- Thrivent Financial for Lutherans (TDA 206)
- Midland National Life (ORP 063)
- Ameriprise Financial Services (ORP 010, TDA 031)
- Waddell & Reed (ORP 073, TDA 215)
- Diversified Investors (Transamerica Financial) (ORP 011, TDA 078)
- AVIVA (Delta Life/American Investors Life) (ORP 072, TDA 201)
- Modern Woodmen of America (TDA 008)
- Horace Mann Life Insurance Co. (TDA 010)

*Vendors who **will not comply** with IRS regulations and information sharing requirements:*

- American Funds (ORP 069, TDA 181)
- Van Kampen (ORP 053, TDA 160)
- John Hancock Signature Services (ORP 018, TDA 006)
- National Western Life (ORP 058, TDA 190)
- Trust Company of America (ORP 076)
- Jefferson Pilot Life Insurance (ORP 004, TDA 045)
- Pioneer Investments (ORP 060, TDA 192)
- Nationwide Life Insurance (ORP 035, TDA 117)
- State Farm Insurance (ORP 014)
- John Hancock Life (ORP 062, TDA 202)
- Jackson National Life (ORP 070, TDA 214)
- FTJ Fundchoice (TDA 016)
- Merrill Lynch (ORP 068, TDA 213)
- ReliaStar Life Insurance (formerly Northern Life Insurance) (ORP 052, TDA 155)
- Americo Financial Life & Annuity (TDA 019)
- American Skandia (ORP 021, TDA 038)
- American United Life (TDA 216)
- Franklin Templeton (ORP 078, TDA 013)
- Evergreen Funds (ORP 055, TDA 183)

- Fidelity Guaranty Life (TDA 027)
- General American Life (TDA 007)
- INVESCO/Aim (ORP 013, TDA 026/203)
- New York Life (TDA 098)
- Prudential Life Insurance (ORP 028, TDA 012)
- Resource Trust (Fiserv) (ORP 071, TDA 200)
- Southern Farm Bureau (TDA 113)
- Sun Life (ORP 048, TDA 151)
- Transamerica Life (ORP 025)
- US Global (ORP 005)
- Union Central Life (ORP 017, TDA 115)
- United Investors (ORP 081, TDA 024)
- T. Rowe Price (TDA 204)
- Symetra Life Insurance (ORP 043, TDA 139)
- Wachovia (ORP 009, TDA 049)
- Conseco Life Insurance Co. (ORP 079, TDA 014)
- Western National Life Ins (AIG Annuity) (ORP 057, TDA 076)
- ITT Hartford (ORP 020, TDA 040)

The current list of approved vendors for the ORP and TDA programs is located at <http://www.tamus.edu/benefits/retirement/orpnda.html>