WALLINGFORD  SWARTHMORE

SCHOOL DISTRICT

Human Resources Department

200 SOUTH PROVIDENCE ROAD, WALLINGFORD, PENNSYLVANIA 19086-6334

PHONE (610) 892-3470 EXT. 1401 FAX (610) 892-3497

Directions for Switching 403(b) Providers

This type of transaction is called a “403(b) Contract Exchange/457(b) Transfer” and the form that is used to initiate it is called the “Transaction Routing Request.” In addition to completing the Transaction Routing Request (TRR), employees who wish to move 403(b) monies from one district provider to another should complete the following steps:

* Contact your existing 403(b) provider to request their 403(b) contract exchange paperwork (separate from the TRR) and inquire about any applicable termination fees. Just because you are exchanging the money from one district provider to another doesn’t mean that there won’t be extra fees.
* Create an account with the new 403(b) district approved provider (if you haven’t already done so). Find out from the new 403(b) provider if there is a contract exchange form that they need completed as well.
* Complete the TRR form (Identification section, Section B, and the last section, Where and how should TSACG send the completed paperwork). Here is the link to the form: <http://www.wssd.org/cms/lib02/PA01001072/Centricity/Domain/23/Transaction_Routing_Request_form.pdf>
* Send all paperwork and the TRR form to TSA Consulting Group, as instructed on the TRR form.

All transactions are coordinated through the District’s Third Party Administrator (TPP), TSA Consulting Group, Inc. (TSACG). The Wallingford-Swarthmore School District has contracted with TSACG to provide 403(b) & 457(b) plan administration services. TSACG, based in Fort Walton Beach, Florida, is an independent TPA and is not affiliated with an investment provider nor do they market investment products. TSACG will be responsible for the approval of transactions such as Distributions, Exchanges, Transfers, Loans, and Rollovers. After reviewing submitted paperwork to ensure that the transaction complies with IRS regulations and the Plan, TSACG will forward approved paperwork to the applicable investment product provider who will complete the transaction by disbursing funds directly to the participant or directly to an account specified by the participant.

TSACG will process your paperwork in 3-6 business days and communicate with you if you include your email address on the documentation.

All completed forms must be submitted to TSACG for processing, not the District.

All transaction requests should be submitted to TSACG for processing via fax, mail, or email.

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| Fax # 1-866-741-0645 or 1-866-814-0622 | Email: [recordkeeping@tsacg.com](mailto:recordkeeping@tsacg.com) |
| Regular Mail:  TSA Consulting Group, Inc.  Attn: Participant Transactions Department  P.O. Box 4037  Fort Walton Beach, FL 32549-4037 | Overnight Mail:  TSA Consulting Group, Inc.  Attn: Participant Transactions Department  73 Eglin Parkway NE, Suite 302  Fort Walton Beach, FL 32548 |