

Steps and details to Enroll in a Tax-Deferred Annuity Plans: 403B & 457 Plans

- All Branchburg Twp. School District employees are eligible to contribute to a tax-deferred retirement plan.
- The District offers three Service Providers:
 - AXA Equitable
 - Fidelity Investment
 - Lincoln Investment
- Contact each provider we use and decide which plan is best for you:
 - AXA Equitable-(732-865-4504)
 - Fidelity Investment-(1-800-343-0860)
 - Lincoln Investment-(201-636-1636)
- Contact the individual company of your choice to choose your preferred plan
- The company of your choice along with PenServ (our third-party service provider) will then send the necessary information to the Board Office to begin contributions

PenServ:

- Branchburg School District has a 3rd party administrator, PenServ, to “oversee” our 403B & 457 tax-deferred annuity plans. Due to changes in IRS regulations, PenServ has the knowledge and expertise to administer these changes.
- Customer Service at 800-849-4001, 7:30AM-5:00 PM Monday through Friday

Please complete the salary reduction agreement form:

- You will need to complete a Salary Reduction Agreement (SRA) , if you sign up with AXA or Lincoln, the agent should provide it for you
- If they do not, call or email Donna in the board office, she will be able to send you the SRA
- Complete Form
- Once complete, send it to your agent or send it to the Board Office
 - Either your agent or Donna in the board office will forward the SRA to PenServ for you.