

TSACG provides a variety of services to public education employers that relate to the compliance and administration of the 403(b) and 457(b) retirement plan. Please use the guide below as an internal source document for our administration services and personnel.

*Please note: when inquiring via email, sending the email to the group boxes indicated throughout the document will ensure that multiple team members receive your correspondence. This process ensures that in the absence of any specific team member, your inquiry will be read and responded to promptly.*

## Program Services

TSACG Administration Office  
15 Yacht Club Drive NE  
Fort Walton Beach, FL 32548

Our Program Services department is responsible for the following:

- Compliance Questions/Issues
- Plan Documents/Adoption Agreements
- Plan Consulting
- IRS Audit Support
- Investment Provider Relationship Management
- Investment Provider Agreements
- Service Implementation
- Client Relations

## Contact information for general inquiries:

Telephone - 888.777.5827 Option 0  
Email – [programservices@tsacg.com](mailto:programservices@tsacg.com)

## Participant Services

TSACG Participant Services Office  
73 Eglin Parkway NE  
Suite 202  
Fort Walton Beach, FL 32548

Our Participant Services department includes our Remittance, Salary Reduction Agreement and Recordkeeping teams:

### Recordkeeping Services

Our Recordkeeping Services department is responsible for reviewing, approving or declining all plan distributions, including:

- Ensuring requested distributions are permissible under Internal Revenue Service (IRS) requirements and the Employer's plan document as well as ensuring the participant qualifies for the distribution
- Answering questions related to participant distribution requests

### Salary Reduction Agreement Services

Our Salary Reduction Agreement (SRA) department is responsible for reviewing and approving all salary reduction agreements, including:

- Confirming the participant's account is active and ready to receive contributions
- Sending SRA deduction information to the employer

## Remittance Services

Our Remittance department is responsible for the set-up and support of the common remitting system, including:

- Initial set-up of the system, including assistance establishing the Wells Fargo bank clearing account
- Coordination between the Plan Sponsor and the vendors receiving funds
- Remittance error correction assistance
- Support and assistance for questions regarding contribution refund processing
- Technical support and assistance to the Plan Sponsor and vendors receiving funds

## Contact information for general inquiries:

Recordkeeping Services

Telephone – 888.796.3786 Option 4

Email – [recordkeeping@tsacg.com](mailto:recordkeeping@tsacg.com)

Salary Reduction Agreements

Telephone – 888.796.3786 Option 5

Email – [sra@tsacg.com](mailto:sra@tsacg.com)

Remittance Services

Telephone – 888.796.3786 Option 6

Email – [epars@tsacg.com](mailto:epars@tsacg.com)

## Education Services

Our Education Service department is responsible for the following:

- Meaningful Notice Materials
- TSACG Website
- Video Production
- Request for Proposal Preparation

## Contact information for general inquiries:

Telephone – 866.777.5827 Ext. 3302

Email – [publications@tsacg.com](mailto:publications@tsacg.com)

## Business Services

TSACG Business Services  
P.O. Box 2799  
Fort Walton Beach, FL 32549

Our Business Operations department is responsible for the following:

- Contracting; initial and renewals
- Billing and related inquiries
- Oversight of remittance funds balances

## Contact information for general inquiries:

Telephone – 866.777.5827 Ext. 3200

Contract Email – [admin@tsacg.com](mailto:admin@tsacg.com)

Billing Email – [finance@tsacg.com](mailto:finance@tsacg.com)