Office of Treasurer/Collector's Office

Town of Norwell
345 Main Street, Norwell, MA 02061
Tel: 781-659-8071
Fax: 781-659-7795
PAdduci@townofnorwell.net

Town of Norwell Public Schools
Approved 403b Provider Contact List

This list contains those approved investment firms who are approved to receive contributions (and/or contract exchanges) under the Town of Norwell Public Schools 403(b) plan. As the Plan Sponsor, we oversee all account activity with VOYA/Plan With Ease as our designated third-party administrator. Please contact Darleen Sullivan in the Office of the Treasurer/Collector if you have any questions.

Click this link to access the 2021 Universal Availability Notice:

http://www.townofnorwell.net/treasurer-collector/pages/employee-benefit-payroll-information

AIG/Valic:
800-448-2542

Ameriprise:
William.P.Devilly@amp.com
800-862-7919

Commonwealth Annuity:
Catherine.Mccord@gafg.com
800-533-7881

Equitable:
Susan.Barber@equitable.com
www.equitable.com
www.highlandfinancialgroup.com
Tel: 781-749-4929
Fax: 781-749-4928
Cell: 781-820-2184

Great American: **GRANDFATHERED*
No New Applicants Eff. 7/1/2020
800-854-3649
Anthony May – Amay@cff1.com

Horace Mann:
781-740-8444
781-740-8666 (Fax)
617-633-6045 (Cell)
Michael Letorney:
Michael.Letorney@horacemann.com

Lincoln Financial:
800-454-6265

Lincoln Investment planning
Jason W. Levine MBA, CFP
Jlevine@lincolninvestment.com
95 Sawyer Road, Suite 430
Waltham, MA 02453
781-647-3050 (Direct)
781-647-3070(Fax)
800-608-3937 (Ext. 5491)

MetLife:
Sean O'Brien
SObrien@metlife.com

800-842-9406 CT 800-560-5001 FL

Oppenheimer:
Kevin.Hawkinson@opco.com
800-225-5677

Putnam:
866-207-7262

Reliastar/Voya:
Jennifer.George@voya.com
781-796-9860
877-884-5050

Security Benefit:
800-888-2461
phil.hahn@securitybenefit.com

IMPORTANT NOTICE: This notice is not intended as tax or legal advice. Neither our employer nor the investment providers offering retirement savings products under the 403(b) plan can provide you with tax or legal advice. Employees are encouraged to contact their financial representative or tax professional with any questions.