



Brighton Area Schools Authorized Investment Providers - Tax Sheltered Annuities (TSA)

If you want to take advantage of saving for retirement on a tax-deferred basis via a 457 or 403b Tax Sheltered Annuity(TSA), you can start here.

Pick Your Investment Provider

Review the BAS list of authorized investment providers listed below and determine where you want to invest your money. This list is also available on the [BAS Staff Website](#) under “Fringe Benefits”.

Not sure which investment provider to choose?

Review company marketing materials, consult with your financial advisor, or ask a trusted colleague or mentor if they work with an advisor or investment provider they would recommend.

Contact Your Chosen Investment Provider

Once you have decided on an investment provider or providers, be sure to contact them and establish an account. The TSA Representative can guide you on setting up your 403b or 457 plan.

Complete a Salary Reduction Agreement

Your TSA Representative will complete your initial Salary Reduction Agreement form and send it to BAS for processing. If you wish to make updates, please complete an updated Salary Reduction Agreement (SRA) form, located on the [BAS Staff Website](#) under “Fringe Benefits.” Updates can be implemented up to 6 times in a calendar year.

What Happens Next?

Once your SRA request has been submitted, BAS will begin deducting your contribution amount from your paycheck and send the funds to your chosen investment provider or providers.



Annuity Companies	Contact Person	Phone Number
<u>7 Pillars Wealth Management</u>	<u>Lisa Spitler</u>	810-533-4138
<u>Edward Jones</u>	<u>Chris Wolschleger</u>	(810) 229-6515
	<u>Mike Johnson</u>	(810) 295-1105
<u>Equitable Advisors Great Lakes</u> (Formerly AXA Advisors)	<u>Joseph Sarnecky</u>	(248) 641-2650
* <u>GLP Financial Group</u> (Voya, Franklin, Templeton, National Life Group)	<u>Adam Laurie</u>	(248) 877-7733
	Mike Sorka	(734) 237-9443
<u>Insight Financial Partners</u> (Mass Mutual)	<u>Steve Kenger</u>	Main Office:(734) 214-3980 Direct: (517) 402-9364
<u>Sound Financial Services</u> (Putnam, American Funds)	<u>Jerry Repovz</u>	(810) 231-7576
	Brian Repovz	(810) 231-7576
<u>Vanguard</u>	No Representative	(800) 962-5068
* <u>CoreBridge Financial</u> (Formerly VALIC)	Dane Colberg	(517) 899-4969 (800) 448-2542

The Annual Contribution Limit for 2026 is \$24,500.

Employees who are age 50 or older on December 31, 2026, may contribute an additional \$8,000 above the basic 2026 annual limit of \$24,500 for a total of \$32,500.

Limits are determined by the IRS and are updated annually.

*These companies are the only BAS approved vendors for 457 Plans

Questions?

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