



## University Medical Center

You are not eligible to enroll until **AFTER** 90 days of service with UMC. Once you do qualify and want to participate, you **MUST** setup an account with one of our approved fund companies listed below **BEFORE** making elections in Workday.

UMC will only match on the 403(b) plans effective 01/01/2023

*Employees may change funding accounts at any time.  
 Balance transfers require approval of a rollover request.*

### Tax-Sheltered Annuity (TSA) Retirement Accounts

403(b) & Roth Accounts	Company	Representative
Aspire Financial Services	Edward D Jones Company 6102 Chicago Ave, Suite 200 Lubbock, TX 79424	Mr. Kyle Motheral (806) 783-3072
Lord Abbett	Peak Wealth Advisors 6000 Greenwood Plaza Blvd, Suite 100 Greenwood Village, CO 80111	Mr. Garry Kirkland (303) 268-2213
Primerica	Primerica Financial Services 3318 83rd St, Suite 400 Lubbock, TX 79423	Mr. Arnold Hall (806) 785-5959
Vanguard	Vanguard P.O. Box 534044 St. Petersburg, FL 33747	Participant Services (800) 569-4903
457 Accounts	Company	Representative
Nationwide Retirement Solutions	Nationwide Retirement Solutions P.O. Box 182797 Columbus, OH 43218	Mr. Jim Hammock (806) 441-6069

UMC TSA Match	
COMPLETED LENGTH OF SERVICE	% OF ELIGIBLE CONTRIBUTIONS MATCHED
3 months +	Up to 5%
11 years (132 months) +	Up to 6%
20 years (240 months) +	Up to 7%
25 years (300 months) +	Up to 8%