

Southern Illinois University Carbondale

Supplemental Retirement Plan 403(b)

Approved Vendors

The following vendors and their appointed representatives have been authorized by the Board of Trustees to offer a supplemental 403(b) retirement account to the employees of Southern Illinois University Carbondale. For information concerning enrollment or to establish an account, please contact the representative below. For TIAA enrollments, follow the instructions listed below.

Fiduciary Trust International of the South (Franklin Templeton)

Joel W. Sambursky, MBA, AIF
Liberty Wealth Management
2250 Reed Station Parkway, Suite 102
Carbondale, IL 62901
Office: 618-351-7526
Fax: 618-351-1471
Joel.sambursky@lpl.com
Website: <http://www.fiduciarytrust.com/>
Website: www.libertywealthonline.com

Security Financial Resources, Inc.

Brad Wills
Alliance Investment Planning Group
115 S. Washington
Carbondale, IL 62901
Office: 618-519-9344
Fax: 317-581-1189
brad@allianceinvestmentplanning.com
Website: www.securitybenefit.com

Quorum Consulting Group (Citigroup SmithBarney)

Christopher Noonan, QFPC
Morgan Stanley Wealth Management
3201 West White Oaks Dr., Suite 201
P.O. Box 13400
Springfield, IL 62704
Office: 217-547-2916
Mobile: 217-993-2128
Fax: 217-993-2128
Christopher.Noonan@morganstanley.com
Website: www.morganstanley.com

TIAA

Katie Reed
333 W. Wacker Dr, Suite 2800
Chicago, IL 60606
Office: 312-345-5637
Kathleen.reed@tiaa.org
Website: www.tiaa.org

TIAA enrollments can be completed on-line:

To enroll, go [here](#) & then click on **Register Now**. Use access code = 103379

Then complete the [Salary Reduction Agreement](#) and submit completed form to HR Benefits, MC 6520 or email at HRBenefits@siu.edu.

To schedule a virtual or phone appointment with Katie Reed, TIAA, click [here](#).