

MARKETING TAX-
SHELTERED
ANNUITIES

Any company wishing to market tax-sheltered annuities to District employees must observe the following guidelines:

1. The company must be a “certified company” on the current list maintained by TRS.
2. Printed material for the company will be made available to employees in accordance with policy GKDA(LOCAL).
3. The District will not allow direct marketing activities in the form of general faculty presentations or phone calls during the schoolday or workday. If requested by an employee, however, a company representative may meet the employee on school property outside the employee’s workday. All such representatives must follow District rules for visitors to campuses. [See GKC]