



TSA Consulting Group, Inc (TSACG) Key Contact List

TSACG provides a variety of services to public education employers that relate to the compliance and administration of the 403(b) and 457(b) retirement plan. Please use the guide below as an internal source document for our administration services and personnel.

Please note: when inquiring via email, sending the email to the group boxes indicated throughout the document will ensure that multiple team members receive your correspondence. This process ensures that in the absence of any specific team member, your inquiry will be read and responded to promptly.

Program Services

TSACG Administration Office
15 Yacht Club Drive NE
Fort Walton Beach, FL 32548

Our Program Services department is responsible for the following:

- Compliance Questions/Issues
- Plan Documents/Adoption Agreements
- Plan Consulting
- IRS Audit Support
- Investment Provider Relationship Management
- Investment Provider Agreements
- Service Implementation
- Client Relations

Contact information for general inquiries:

Telephone - 888.777.5827 Option 0
Email – programservices@tsacg.com

Participant Services

TSACG Participant Services Office
73 Eglin Parkway NE
Suite 302
Fort Walton Beach, FL 32548

Our Participant Services department includes our Remittance and Recordkeeping teams:

Remittance Services

Our Remittance Services department is responsible for the set-up and support of the common remitting system, including:

- Initial set-up of the system, including assistance establishing the Wells Fargo bank clearing account
- Coordination between the Plan Sponsor and the vendors to receive funds
- Remittance Error Correction Assistance
- Support and assistance for questions regarding 403(b) refund processing
- Technical support and assistance to the Plan Sponsor and vendors receiving funds

Contact information for general inquiries:

Remittance Services

Telephone – 888.796.3786 Option 6

Email – epars@tsacg.com

Recordkeeping Services

Our Recordkeeping Services department is responsible for reviewing, approving or declining 403(b) or 457(b) transactions, including:

- Ensures requested transactions are allowable under Internal Revenue Service (IRS) requirements and the Employer's plan document and that the participant qualifies for the transaction
- Assistance for questions relating to participant transaction requests

Contact information for general inquiries:

Recordkeeping Services

Telephone – 888.796.3786 Option 4

Email – recordkeeping@tsacg.com

Education Services

Our Education Service department is responsible for the following:

- Meaningful Notice Materials
- TSACG Website
- Video Production
- Request for Proposal Preparation

Contact information for general inquiries:

Telephone – 866.777.5827 Ext. 3302

Email – publications@tsacg.com

Business Services

TSACG Business Services
P.O. Box 2799
Fort Walton Beach, FL 32549

Our Business Operations department is responsible for the following:

- Contracting; initial and renewals
- Billing and related inquiries
- Oversight of remittance funds balances

Contact information for general inquiries:

Telephone – 866.777.5827 Ext. 3200

Contract Email – admin@tsacg.com

Billing Email – finance@tsacg.com