



Department of Human Resources
University of Massachusetts Medical School
419 Belmont Street
Worcester, MA 01604
Phone: (508) 856-1897
Fax: (508) 856-2058

Katie Temple
Retirement Specialist

TAX SHELTERED ANNUITIES

457 Plan (SMART PLAN) Provider

ING
Lucinda Nagle
508-792-2881 ext. 212

403B Plan Providers

TIAA-CREF
Donald Smith
866-842-2824

AIG VALIC
Carol Ring
800-892-5558 X87782

CITISTREET ASSOCIATES
Ghislaine Roche
781-444-4055 (office)
866-424-8432 ext. 45147 (direct voicemail)

FIDELITY INVESTMENTS
Jonathan Williamson 508-792-2849 ext. 50065
Joe Hanley 508-792-2849 ext. 50058
Customer Service 800-343-0860

VANGUARD GROUP
Client Service Representatives
800-523-1188

For enrollment kits for any of these vendors, please contact Katie Temple at
508-856-1897 or email Katie.Temple@umassmed.edu