



## Vendor Solicitation Rules

**Leander ISD restricts access to its campuses by third- party vendors except as expressly authorized.**

1. LISD has contracts with our benefit providers which were all competitively bid. LISD's benefit administrator is TCG Advisors. Please contact Matt Escalante at 512-306-9939 or [mescalante@tcggroupholdings.com](mailto:mescalante@tcggroupholdings.com) for further information on submitting a proposal during our next bid process.
2. All 403(b) retirement plan vendor agents must agree to our Third Party Administrator's (TPA) requirements. LISD's TPA is TCG Advisors. Please contact Scott Hauptmann at 512-600-5230 or [shauptmann@tcggroupholdings.com](mailto:shauptmann@tcggroupholdings.com) for further information.
3. 403(b) vendor agents may be invited to the annual employee conference to set up a marketing table at the benefits fair and schedule appointments with employees to discuss products. TCG Advisors will coordinate this activity.
4. LISD has a closed campus policy regarding solicitation by third party vendors. This means that Agents/Solicitors are not allowed on campus to meet with employees to discuss retirement planning or products except as specifically authorized such as at the annual employee conference referenced above.
5. Agents/Solicitors may not send sales materials or any type of literature to employees through LISD email.
6. Agents/Solicitors may not drop off any literature to be distributed on campus or placed in employee's mailboxes. LISD internal mail is not available for use by third parties.
7. Agents/Solicitors may not use district phone numbers to solicit employees.
8. **Any Agent/Solicitor who violates any of LISD's policies will lose any and all privileges for soliciting Leander ISD employees on school property. Any violations may also be referred to the Agent/Solicitor's retirement plan vendor or the Texas Department of Insurance.**