Town of Burlington 403(b) and 457 Options

Eligible Employees may enlist in 457 and 403(b) Deferred Comp plans.

Employees are eligible for the plans upon initial employment or at any time during the year.

The Town does not monitor performance or make recommendations.

Changes to contributions or allocation of funds is the responsibility of the employee.

457 Plans For Benefit Eligible Town and School Employees

Empower Retirement:	www.mass-smart.com
Smart Plan 457	Tyler Fouhey 617-535-8960
Smart Plan Roth	Tyler.Fouhey@empower.com
Nationwide:	
457 Plan	Group # 0037116001
	bartk1@nationwide.com
	Kenneth Bart

403(b) Plans for Benefit Eligible School employees only

Capital Guardian Trust-American Funds	Group #744589457
www.capitalgroup.com	Tel: 800.421.4225
AXA Equitable- Equi Vest and Roth Plans	Plan Unit # 006705
www.equitable.com	Sarah Brodeur Tel: 508-596-6004
	Sarah.brodeur@equitable.com
	Marc Foley Tel: 781-237-8230
	Marc.foley@equitable.com
	Zachary Levy Tel: 781-772-1026
	Zachary.levy@equitable.com
Fidelity Investments	Plan Number #50055
	Aaron Skloff Tel: 908-531-6422
	askloff@skloff.com
	1-800-343-0860 Fidelity Customer Service
Lincoln Investments	John Ford - Horizon Financial Group
	jford@horizongrp.net
	339-933-7575 (cell) / 781-444-4141 X205 (Office)
Waddell and Reed	Bob Jefferson rjjefferson@wradvisors.com
	Jack Jefferson jjefferson@wradvisors.com
	Brett Herlihy 781-298.8800 bherlihy@wradvisors.com

Contribution limits for 2026

- $24,500 – under age 50 years old
- $32, 500 – 50+ years old (catch-up of $8,000)
- $35,750 – Special Age 60-63 (catch-up of $11,250)
- $49,000 – Special Catch-Up (within 3 years of retirement). Needs to be set up with your respective Representative first.