



## Vendor Solicitation Rules

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

1. All 403(b) retirement plan vendor agents must agree to our Third Party Administrator's (TPA) requirements. CFB's TPA is TCG Administrators. Please contact Scott Hauptmann at 512-600-5230 or [shauptmann@tcgservices.com](mailto:shauptmann@tcgservices.com) for further information.
2. CFB 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.
3. Agents/Solicitors may not send sales materials or any type of literature to employees through CFB email.
4. Agents/Solicitors may not drop off any literature to be distributed on campus or placed in employee's mailboxes. CFB internal mail is not available for use by third parties.
5. Agents/Solicitors may not use district phone numbers to solicit employees.
6. **Any Agent/Solicitor who violates any of CFB's policies will lose any and all privileges for soliciting Carrollton-Farmers Branch 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.**