

## **SchoolsFirst FCU Expands Financial Planning Services for Members and Educators Across California**

**Tustin, Calif. (Dec. 17, 2025)** – [SchoolsFirst Federal Credit Union](#) announced that its Third-Party Administrator (TPA) affiliate, [SchoolsFirst Plan Administration, LLC](#), successfully onboarded a number of new school districts in California in 2025, greatly expanding its presence into new regions. As a TPA, SchoolsFirst Plan Administration helps school districts with IRS plan compliance, education and customized personal financial advice.

“Through SchoolsFirst Plan Administration, we help ensure that our Members and school employees are confident in their ability to enjoy financial well-being not only in their working years, but also during retirement,” said Carol Rose, executive vice president of Member service operations of SchoolsFirst FCU. “With significant growth in the Bay Area, Central Valley and Greater Sacramento Area, we’re providing financial planning and support across California.”

In 2025, new school districts in Alameda, Colusa, Contra Costa, Imperial, Kern, Lake, Los Angeles, Monterey, Napa, Nevada, Orange, Placer, Sacramento, San Francisco, Santa Barbara, Shasta, Siskiyou, Solano, Sonoma, Sutter, Yolo and Yuba counties have selected SchoolsFirst Plan Administration as TPA. A full list of participating school districts can be found at [schoolsfirstfcu.org/districtsweserve](#). For additional information about retirement plan services provided by SchoolsFirst Plan Administration, LLC, interested school districts may visit [SchoolsFirst District Center](#).

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### About SchoolsFirst Plan Administration, LLC

As the leading third-party administrator of retirement plans for school employees, SchoolsFirst Plan Administration, LLC, has served the educational community for more than 40 years. SchoolsFirst Plan Administration provides retirement plan services for 403(b), Roth 403(b), 457(b), Roth 457(b) and FICA Alternative plans for more than 400 public school districts, charter schools, community college districts and county offices of education in California. Plan participants have full access to financial education and advice provided by SchoolsFirst FCU, including access to financial planning advisors, seminars, online education and planning calculators. Other services provided by SchoolsFirst Plan Administration include retaining contribution information, authorizing loans and distributions, dedicated phone support for both districts and participants six days a week, and contribution remittance, plan audit support, and secure online access.

### About SchoolsFirst Federal Credit Union

SchoolsFirst Federal Credit Union is the largest credit union serving school employees and their families, and for the seventh year in a row, Forbes has named SchoolsFirst FCU the top credit union in California. The organization is dedicated to delivering World-Class Personal Service and improving the financial lives of its Members. In J.D. Power’s 2025 inaugural U.S. Credit Union Satisfaction Study, its Members ranked them #1 for overall satisfaction. Today they serve more than 1.5 million Members with a full range of financial products and services. SchoolsFirst FCU was founded in 1934, when 126 school employees pooled \$1,200 and established a Member-owned cooperative to help improve each other's lives. The Credit Union has more than \$34 billion in assets and remains the largest credit union in California and the third largest credit union in the United States. For more information about SchoolsFirst FCU, visit [schoolsfirstfcu.org](#).

Insured by NCUA.

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