

List of Authorized 403(b) & 457 Providers for Bay District Schools

403(b) Product Providers:

	Investment Provider		Authorized Representative	Phone
12-001	ReliaStar Life Subsidiary of VOYA Financial (Fixed Annuities)	1-877-882-5050	Bert Ritter Ted Haney John Messer John Hludinski Kenneth Brookins Stephen Ayers Alice Faye Marshall	800-330-4944 (850) 763-1783 (850) 872-1840 800-330-4944 (850) 215-4803 (850) 215-4803 (850) 643-8577
12-003	Horace Mann Insurance Co. (Fixed & Variable Annuities)	1-800-999-1030	Wendy Varnum	(850) 769-8030
12-004	AIG Retirement Services (VALIC) (Variable Annuities)	1-800-448-2542	Otis Thames	(850) 443-8048
12-006	AXA Equitable Life Insurance (Variable Annuities)	1-800-628-6673	Les Brackett Jerry Sowell	(850) 763-0308 (850) 763-0308
12-011	Metropolitan Life Insurance Brighthouse (Variable Annuities)	1-800-560-5001	Kristina Elgee Gail Milon	(850) 774-1157 (850) 591-4010
12-034	Midland National Life (Variable Annuities)	1-877-586-0240	Tommy Currid Tiffany Currid Danny Mitchell Frank Rossetti Michael Rossetti Samuel Alfred	(850) 897-4964 (850) 897-4964 (850) 319-7007 (352) 293-2972 (352) 293-2972 (407) 937-8791
12-037	IPX American Century Services (Mutual Funds - No Load)	1-844-788-3474 Ext 5	www.americancentury.com/florida	
12-038	National Life Group (Equity Index Annuities)	1-800-579-2878	Gary Tetreault Brandon Holmes Brandon Kent Timothy Myers Len Adams	(386) 478-9106 (904) 575-1232 (334) 790-5933 (334) 714-8793 (407) 630-0000
12-039	PlanMember Services (Mutual Funds - Load)	1-800-874-6910	Virginia Lind Ryan Ewart Rodney Roberts	(850) 862-5511 (386) 689-6601 (850) 384-1618

12-026	Franklin Templeton Mutual Funds (Variable Annuities)	1-800-527-2020	Harbor Financial	John Johnson	(850) 215-0800	
			Harbor Financial	Mary (Lori) Eldridge	(850) 215-0800	
			Wells Fargo Advisors LLC	Joseph (Alan) McCurley	(850) 785-0273	
			Wells Fargo Advisors LLC	Kelly Bonner	(850) 785-0273	
			Wells Fargo Advisors LLC	Todd Zaborski	(850) 785-0273	
			Wells Fargo Advisors LLC	Hal Burleson, Jr.	(850) 785-0273	
			Wells Fargo Advisors LLC	Jared Burleson	(850) 785-0273	
			Benjamin F. Edwards & Co.	Kathleen Duncan	(850) 769-7053	
			Benjamin F. Edwards & Co.	Malissa Romack	(850) 769-7053	
			Benjamin F. Edwards & Co.	Lolita Nettles	(850) 769-7053	
			Edward Jones	Matthew Wegner	(850) 769-1278	
			Edward Jones	Richard Filippi	(850) 265-5040	
			Edward Jones	Harry Henning	(850) 769-9569	
			Edward Jones	Carlton Stabler	(850) 785-2558	
			Edward Jones	Michael Calidonna	(850) 233-2089	
			Edward Jones	Jaye Chapman	(850) 769-1278	
			Raymond James	Heather Noyes	(850) 785-9614	
			Raymond James	Todd Thompson	(850) 785-9614	
			Raymond James	Tom King	(850) 785-9614	
			Raymond James	Frank Martin	(850) 785-9614	
			Raymond James	Bill Cordell	(850) 785-9614	
			Raymond James	Billy Stevenson	(850) 785-9614	
			UVEST Financial	E. Duane Southerland	(850) 763-8500	
			ING Financial Partners	Hugh (Mike) Owens	(850) 872-9312	
			LPL Financial	Joe Gainer	(850) 769-0131	
			LPL Financial	Steven Moss	(850) 249-5304	
			LPL Financial	Patricia Borinski	(850) 215-3829	
			Raymond James	Amanda W. Jowers	(850) 785-9614	
			Aspire Financial Partners	Philip Cunningham III	(850) 238-8806	
12-045	Security Benefit Group (Mutual Funds - Load)	1-800-888-2461		Granville Knowles	(888) 616-5333	Office
					(850) 528-4693	Cell
				Mark Jordan	(334) 794-8219	
				Joseph Hamner	(850) 819-7119	
			Raymond James	Amanda W. Jowers	(850) 785-9614	
			Aspire Financial Partners	Philip Cunningham III	(850) 238-8806	
12-045	Security Benefit Group (Mutual Funds - Load)	1-800-888-2461		Granville Knowles	(888) 616-5333	Office
					(850) 528-4693	Cell
				Mark Jordan	(334) 794-8219	
				Joseph Hamner	(850) 819-7119	

457 Product Providers:

Investment Provider			Contact Individual / Agent	
12-019	AIG Retirement Services (VALIC)	1-800-448-2542	Otis Thames	(850) 443-8048
12-040	Horace Mann Insurance Co.	1-800-999-1030	Wendy Varnum	(850) 769-8030
12-042	AXA Equitable Life Insurance	1-800-628-6673	Les Brackett Jerry Sowell	(850) 763-0308 (850) 763-0308
12-043	PlanMember Services	1-800-874-6910	Virginia Lind Ryan Ewart Rodney Roberts	(850) 862-5511 (386) 689-6601 (850) 384-1618
12-044	National Life Group	1-800-579-2878	Gary Tetreault Brandon Holmes Brandon Kent Timothy Myers Len Adams	(386) 478-9106 (904) 575-1232 (334) 790-5933 (334) 714-8783 (407) 630-0000
12-046	Security Benefit Group	1-800-888-2461	Joseph Hamner	(850) 819-7119

Roth 403(b) Product Providers: (After-Tax)

Investment Provider			Contact Individual / Agent	
15-001	PlanMember Services	1-800-874-6910	Virginia Lind Ryan Ewart Rodney Roberts	(850) 862-5511 (386) 689-6601 (850) 384-1618
15-002	AIG Retirement Services (VALIC)	1-800-448-2542	Otis Thames	(850) 443-8048
15-003	Horace Mann Insurance Co.	1-800-999-1030	Wendy Varnum	(850) 769-8030
15-004	National Life Group (Equity Index Annuities)	1-800-579-2878	Gary Tetreault Brandon Holmes Brandon Kent Timothy Myers Len Adams	(386) 478-9106 (904) 575-1232 (334) 790-5933 (334) 714-8793 (407) 630-0000