

# The School District of Volusia County

## Approved Tax-Sheltered Annuity and Mutual Funds Companies and Agents

Company	Email Address	Representatives	Phone Numbers
<b>AIG</b>			<b>(800) 448-2542</b>
	<a href="mailto:vince_sorrentino@valic.com">vince_sorrentino@valic.com</a>	*Vince Sorrentino	(407) 482-8831
	<a href="mailto:cameron.obrien@aig.com">cameron.obrien@aig.com</a>	Cameron O'Brien	407-482-8831
	<a href="mailto:drew.darcy@VALIC.com">drew.darcy@VALIC.com</a>	Drew D'Arcy	(386) 337-1819
	<a href="mailto:john.newton@valic.com">john.newton@valic.com</a>	John Newton	(386) 676-0005
	<a href="mailto:Steve.hale@valic.com">Steve.hale@valic.com</a>	Steve Hale, CFP,CLU,CFC	(386) 307-8499
	<a href="mailto:Steven.rosenstock@valic.com">Steven.rosenstock@valic.com</a>	Steven Rosenstock	(407) 375-1861
<b>American Century Investments</b>			<b>(800) 345-3533</b>
		DISTRICT REQUIRES PRIOR APPROVAL BEFORE PAYROLL DEDUCTION CAN BEGIN	
		*	
<b>Equitable</b>			<b>(800) 628-6673</b>
	<a href="mailto:abel.viteri@equitable.com">abel.viteri@equitable.com</a>	*Abel Viteri	(407) 252-6681
	<a href="mailto:damon@wmscfl.com">damon@wmscfl.com</a>	Damon Basco	(407) 760-9968
	<a href="mailto:David.Findley@equitable.com">David.Findley@equitable.com</a>	David Findley	(561) 335-9484
	<a href="mailto:donald.quill@axa-advisors.com">donald.quill@axa-advisors.com</a>	Don Quill	(407) 926-2557
	<a href="mailto:jessica.shane@equitable.com">jessica.shane@equitable.com</a>	Jessica Shane	(321) 443-1590
	<a href="mailto:john.musick@axa-advisors.com">john.musick@axa-advisors.com</a>	John Henry Musick	(407) 246-6500
	<a href="mailto:matthew.price@equitable.com">matthew.price@equitable.com</a>	Matthew Price	(407) 921-2282
	<a href="mailto:steven.pilling@axa-advisors.com">steven.pilling@axa-advisors.com</a>	Steve Pilling	(407) 926-2554
<b>Great American Financial</b>			<b>(800) 438-3398</b>
	<a href="mailto:sneperud@gafri.com">sneperud@gafri.com</a>	*Steve Neperud	(800) 438-3398
	<a href="mailto:bradh@andersfg.com">bradh@andersfg.com</a>	Brad Harrison	(386) 402-7811
	<a href="mailto:dhill@woodburyfinancial.net">dhill@woodburyfinancial.net</a>	David Hill	(386) 983-2418
	<a href="mailto:eorell@appreciationfinancial.com">eorell@appreciationfinancial.com</a>	Edward Orell	(561) 351-9495
	<a href="mailto:Hantenage642@cs.com">Hantenage642@cs.com</a>	Richard Hanten CHFC,CLU	(386) 441-9994
	<a href="mailto:rforton69@gmail.com">rforton69@gmail.com</a>	Robert Forton	(407) 739-7755
	<a href="mailto:ronbowles@legendequities.com">ronbowles@legendequities.com</a>	Ron Bowles	(386) 736-2515
	<a href="mailto:rsomers.nrg@gmail.com">rsomers.nrg@gmail.com</a>	Ron Somers	(321) 230-9849

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\*Agent of Record

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## Approved Tax-Sheltered Annuity and Mutual Funds Companies and Agents

Company	Email Address	Representatives	Phone Numbers
<b>ING (Northern Life Insurance Co)</b>			<b>(877) 884-5050</b>
	<a href="mailto:HantenAge642@cs.com">HantenAge642@cs.com</a>	*Richard Hanten CHFC,CLU	(386) 441-9994
	<a href="mailto:bert_ritter@tsa4u.com">bert_ritter@tsa4u.com</a>	Bert Ritter	(800) 330-4944
	<a href="mailto:thefortis2006@yahoo.com">thefortis2006@yahoo.com</a>	Bob Anderson	(386) 736-7889
	<a href="mailto:ov.williams@ingfp.com">ov.williams@ingfp.com</a>	OV Williams	(386) 254-2925
	<a href="mailto:jaylen27@netzero.net">jaylen27@netzero.net</a>	Robert Rix	(386) 254-2925
	<a href="mailto:ryanpate872@msn.com">ryanpate872@msn.com</a>	Ryan Pate	(386) 254-2925
	<a href="mailto:snealy@voyafa.com">snealy@voyafa.com</a>	Sandra Nealy	(386) 255-8880
<b>Life Insurance of the Southwest</b>			<b>(800) 579-2878</b>
	<a href="mailto:jmarley@nationallife.com">jmarley@nationallife.com</a>	*Jacob Marley	(800) 906-3310
	<a href="mailto:alex.xavier.cordero@gmail.com">alex.xavier.cordero@gmail.com</a>	Alex Cordero	(321) 352-0755
	<a href="mailto:c.purdin@dragon-financial.com">c.purdin@dragon-financial.com</a>	Christian Purdin	(407) 929-4806
	<a href="mailto:cangelica@valuteachers.com">cangelica@valuteachers.com</a>	Christopher Angelica	(614) 937-8725
	<a href="mailto:clbissell@bellsouth.net">clbissell@bellsouth.net</a>	Craig Bissell	(321) 297-9077
	<a href="mailto:eorell@presfinancial.com">eorell@presfinancial.com</a>	Ed Orell	(561) 351-9495
	<a href="mailto:liz@voyageretirement.com">liz@voyageretirement.com</a>	Elizabeth (Liz) Baker	(407) 221-3018
	<a href="mailto:kevinscribner81@gmail.com">kevinscribner81@gmail.com</a>	Kevin Scribner	(407) 948- 6283
	<a href="mailto:tetreault00@hotmail.com">tetreault00@hotmail.com</a>	Kyle Tetreault	(850) 766-6734
	<a href="mailto:lerd@valuteachers.com">lerd@valuteachers.com</a>	Lisa Erd	(386) 290-3843
	<a href="mailto:nspence@appreciationfinancial.com">nspence@appreciationfinancial.com</a>	Nigel Spence	(561) 319-5197
	<a href="mailto:sunnie@themarkanthonygroup.com">sunnie@themarkanthonygroup.com</a>	Sunnie McRee	(386) 402-2516
<b>Lincoln Investment Planning</b>			<b>(800) 370-7377</b>
	<a href="mailto:nicholasgreer@legendequities.com">nicholasgreer@legendequities.com</a>	*Nicholas Greer	(386) 673-1514
	<a href="mailto:bert_ritter@tsa4u.com">bert_ritter@tsa4u.com</a>	Bert Ritter	(561) 432-5656
	<a href="mailto:eileen_ritter@tsa4u.com">eileen_ritter@tsa4u.com</a>	Eileen Ritter	(561) 432-5656
	<a href="mailto:jameslauro@legendequities.com">jameslauro@legendequities.com</a>	James Lauro	(407) 342-8355
	<a href="mailto:fredbarnard@legendequities.com">fredbarnard@legendequities.com</a>	Lee Barnard	(727) 578-2828
	<a href="mailto:hernandez@tsa4u.com">hernandez@tsa4u.com</a>	Maria Hernandez	(800) 330-4944
	<a href="mailto:mgraham@westcoastfinancial.com">mgraham@westcoastfinancial.com</a>	Matt Graham	(813) 269-7100
	<a href="mailto:nhenwood@lincolninvestment.com">nhenwood@lincolninvestment.com</a>	Nathan Henwood	(386) 214-8275
		PatrickFallon	
	<a href="mailto:paul_crisafulli@tsa4u.com">paul_crisafulli@tsa4u.com</a>	Paul Chrisafulli	(352) 433-0656

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Company	Email Address	Representatives	Phone Numbers
<b>Metlife</b>			<b>(800) 492-3553</b>
	<a href="mailto:swilliams6@metlife.com">swilliams6@metlife.com</a>	*Scott Williams	(407) 310-5779
	<a href="mailto:anorman@metlife.com">anorman@metlife.com</a>	Andrew Norman	(386) 673-9373
	<a href="mailto:bdyal@metlife.com">bdyal@metlife.com</a>	Ben Dyal	(386) 673-9373
	<a href="mailto:dogg@metlife.com">dogg@metlife.com</a>	Don Ogg	(407) 782-5051
	<a href="mailto:psteadman@metlife.com">psteadman@metlife.com</a>	Paula Steadman	(305) 401-8747
	<a href="mailto:rmacak@metlife.com">rmacak@metlife.com</a>	Richard Macak	(407) 393-6688
	<a href="mailto:slarson@metlife.com">slarson@metlife.com</a>	Shane Larson	(386) 673-9373
	<a href="mailto:steve.hale@valic.com">steve.hale@valic.com</a>	Stephen Hale, CFP, CLU, CHFC	(386) 307-8499
	<a href="mailto:telders@metlife.com">telders@metlife.com</a>	Todd Elders	(407) 342-4915
<b>Plan Member Services</b>			<b>(800) 874-6910</b>
	<a href="mailto:rrush@planmembersec.com">rrush@planmembersec.com</a>	*Richard Rush	(800) 874-6910
	<a href="mailto:david@rpaeducator.com">david@rpaeducator.com</a>	David Payne	(407) 678-4014
	<a href="mailto:dmims@planmembersec.com">dmims@planmembersec.com</a>	Derrick Mims	(407) 331-7777
	<a href="mailto:Emget@rpaeducator.com">Emget@rpaeducator.com</a>	Emget Williams	(407) 415-2122
	<a href="mailto:joe@rpaeducator.com">joe@rpaeducator.com</a>	Joe Avallone	(407) 678-4014
	<a href="mailto:maria.regeci@planmembersec.com">maria.regeci@planmembersec.com</a>	Maria Regeci	(386) 245-9039
	<a href="mailto:marina@rpaeducator.com">marina@rpaeducator.com</a>	Marina Welding	(407) 678-4014
	<a href="mailto:rewart@planmembersec.com">rewart@planmembersec.com</a>	Ryan Ewart	(386) 689-6601
	<a href="mailto:tshort@planmembersec.com">tshort@planmembersec.com</a>	Tommy Short	(386) 453-6228
<b>Security Benefit Group</b>			<b>(800) 888-2461</b>
	<a href="mailto:Chase.Wilson@SecurityBenefit.com">Chase.Wilson@SecurityBenefit.com</a>	*Chase Wilson	(785) 438-3076
	<a href="mailto:angel@flbenefitsgroup.com">angel@flbenefitsgroup.com</a>	Angel Simpson	(407) 314-7903
	<a href="mailto:daniel@voyagerretirement.com">daniel@voyagerretirement.com</a>	Daniel Rey	(321) 262-6732
	<a href="mailto:jlHUDSON@ovwilliams.com">jlHUDSON@ovwilliams.com</a>	James Hudson	(386) 846-1752
	<a href="mailto:Jeannine.steckclair@raymondjames.com">Jeannine.steckclair@raymondjames.com</a>	Jeannine Steckclair	(386) 427-8245
	<a href="mailto:JSchechtman@financialguide.com">JSchechtman@financialguide.com</a>	Jeff Schechtman	(561) 315-2022
	<a href="mailto:jp@flbenefitsgroup.com">jp@flbenefitsgroup.com</a>	JP Aubry	(407) 463-8738
	<a href="mailto:kevin@voyagerretirement.com">kevin@voyagerretirement.com</a>	N. Kevin Keefer	(248) 534-9969
	<a href="mailto:rich@billgrigat.com">rich@billgrigat.com</a>	Richard Harman	(386) 615-7526
	<a href="mailto:scott.weidman@jwcemail.com">scott.weidman@jwcemail.com</a>	Scott Weidman	(386) 308-5842
	<a href="mailto:ssargeant@gwnsecurities.com">ssargeant@gwnsecurities.com</a>	Sherwin Sargeant	(407) 616-1693
	<a href="mailto:bill@billgrigat.com">bill@billgrigat.com</a>	William (Bill) Grigat, Jr.	(386) 615-7526

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Company	Email Address	Representatives	Phone Numbers
<b>Waddell &amp; Reed</b>			<b>(888) 923-3355</b>
	<a href="mailto:djohnson04@wradvisors.com">djohnson04@wradvisors.com</a>	*Dustin Johnson	(850) 894-9950
	<a href="mailto:alpike@wradvisors.com">alpike@wradvisors.com</a>	Anthony Pike	(407) 916-7700
	<a href="mailto:mvonberg@wradvisors.com">mvonberg@wradvisors.com</a>	Michael Von Berg	(321) 203-7363
	<a href="mailto:reckert@wradvisors.com">reckert@wradvisors.com</a>	Ryan Eckert	(800) 916-7700

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