

MERCER ISLAND SCHOOL DISTRICT

Participating 403(b) Investment Providers

The following investment providers are available for remittance of salary reduction contributions and transfers under the 403(b) Plan:

INVESTMENT PROVIDERS	INVESTMENT PROVIDER CONTACTS
AMERIPRISE FINANCIAL SERVICES	AMERIPRISE FINANCIAL SERVICES, INC JILL CITRON Phone# 425-228-1000 126 WELLS AVE S RENTON, WA 98057
	AMERIPRISE FINANCIAL SERVICES, INC DAVID MUSHEN Phone# 425-640-8636 110 JAMES ST, STE. 105 EDMONDS, WA 98020
	HERITAGE WEALTH ADVISORS ERIC MANZANAREZ Phone# 425-709-2345 ERIC.MANZANAREZ@AMPF.COM 7525 SE 24TH ST., STE. 120 MERCER ISLAND, WA 98040
ASPIRE FINANCIAL SERVICES	ASPIRE FINANCIAL SERVICES ASPIRE FINANCIAL SERVICES Phone# 866-634-5873 4010 BOY SCOUT BLVD, STE. 500 TAMPA, FL 33607
AXA EQUITABLE LIFE INSURANCE	AXA EQUITABLE LIFE INS. CO. AXA EQUITABLE LIFE INS. CO. Phone# 800-628-6673 WWW.AXA.COM/TEACHER P.O. BOX 4956 SYRACUSE, NY 13221

Please Continue

MERCER ISLAND SCHOOL DISTRICT

Participating 403(b) Investment Providers

Continued

INVESTMENT PROVIDERS	INVESTMENT PROVIDER CONTACTS
GREAT AMERICAN INS GROUP - ANNUITY DIVISION	GREAT AMERICAN INSURANCE COMPANY RICHARD ANAYA Phone# 206-355-6629 ATLASRICH@HOTMAIL.COM 3533 SW ELMGROVE ST. SEATTLE, WA 98126
	GREAT AMERICAN INSURANCE COMPANY DOUGLAS ANDERSON Phone# 425-657-2223 1605 NW SAMMAMISH RD, #250 ISSAQUAH, WA 98027
	GREAT AMERICAN INSURANCE COMPANY DAMIAN KAPP Phone# 206-851-4120 NESDAMIAN@AOL.COM P.O. BO X 25013 SEATTLE, WA 98125-1913
	GREAT AMERICAN INSURANCE COMPANY CHRISTOPHER KNAUER Phone# 206-579-0643 GAACHRIS@AOL.COM 9594 FIRST AVE. NE SEATTLE, WA 98115
	GREAT AMERICAN INSURANCE COMPANY BRADLEY KNOWLES Phone# 425-222-4142 BDK2276@COMCAST.NET P.O. BOX 430 FALL CITY, WA 98024
	GREAT AMERICAN INSURANCE COMPANY WADE KNOWLES Phone# 425-482-9123 waydesknowles@verizon.net 20027 29TH AVE SE. BOTHHELL, WA 98012

Please Continue

MERCER ISLAND SCHOOL DISTRICT

Participating 403(b) Investment Providers

Continued

INVESTMENT PROVIDERS	INVESTMENT PROVIDER CONTACTS
GREAT AMERICAN INS GROUP - ANNUITY DIVISION	GREAT AMERICAN INSURANCE COMPANY STEVEN WHITTIER Phone# 253-265-6215 1SWHITTIER@COMCAST.NET P.O BOX 2026 GIG HARBOR, WA 98335
LINCOLN INVESTMENT PLANNING	LINCOLN INVESTMENT PLANNING INC. LINCOLN INVESTMENT PLANNING Phone# 800-242-1421 218 GLENSIDE AVE. WYNCOTE, PA 19095
	SHELGREN FINANCIAL GROUP CINDY TAYLOR Phone# 800-367-4388 CTAYLOR@LINCOLNINVESTMENT.COM 3900 E. VALLEY RD, STE.202 RENTON, WA 98057
METROPOLITAN LIFE INS. CO.	METLIFE RESOURCES METLIFE RESOURCES Phone# 1-800-638-5433 200 PARK AVE NEWYORK, NY 10166
OPPENHEIMER FUNDS	OPPENHEIMER FUNDS OPPENHEIMER FUNDS Phone# 800-835-7305 P.O. BOX 5270 DENVER, CO 80217
RELIASTAR / ING	BARRON FINANCIAL SERVICE, LLC JULIE DRENNON Phone# 253-981-3792 16400 SOUTHCENTER PKWY, STE. 502 SEATTLE, WA 98188

Please Continue

MERCER ISLAND SCHOOL DISTRICT

Participating 403(b) Investment Providers

Continued

INVESTMENT PROVIDERS	INVESTMENT PROVIDER CONTACTS
RELIASTAR / ING	BARRON FINANCIAL SERVICES, LLC STEVE BARRON Phone# 253-981-3792 16400 SOUTHCENTER PKWY, STE. 502 SEATTLE, WA 9818
	RELIASTAR LIFE INS. CO. GARREN MEYER Phone# 425-341-1026 2314 ROSEMONT PL. W. SEATTLE, WA 98199
SECURITY BENEFIT	SECURITY BENEFIT JOHN KLEVENS Phone# 425-453-6353 500 108TH AVE. NE, STE. 252 BELLEVUE, WA 98004
	SECURITY BENEFIT DON NEIDHARDT Phone# 206-236-2009 DONNEIDHARDT@YAHOO.COM 2218 81ST AVE. SE MERCER ISLAND, WA 98040-2212
	SHELGREN FINANCIAL GROUP CINDY TAYLOR Phone# 800-367-4388 CTAYLOR@LINCOLNINVESTMENT.COM 3900 E. VALLEY RD, STE.202 RENTON, WA 98057
	SUMMIT FINANCIAL INC. MATT BUMSTEAD Phone# 425-282-5406 MBUMSTEAD@SUMMITFINANCIALINC.NET 1201 MONSTER RD SW, STE. 420 RENTON, WA 98057-2996

Please Continue

MERCER ISLAND SCHOOL DISTRICT

Participating 403(b) Investment Providers

Continued

INVESTMENT PROVIDERS	INVESTMENT PROVIDER CONTACTS
SECURITY BENEFIT	SUMMIT FINANCIAL INC. JAKE KLEIN Phone# 425-282-5406 JKLEIN@SUMMITFINANCIAL.NET 1201 MONSTER RD SW, STE. 420 RENTON, WA 98057-2996
THRIVENT FINANCIAL	THRIVENT FINANCIAL BRENDAN ROREM Phone# 800-220-8741 BRENDAN.ROREM@THRIVENT.COM 11711 SE 8TH ST., STE. 201 BELLEVUE, WA 98005
VALIC	RETIREMENT PLANNING CONSULTANT BRIAN MILES Phone# 425-247-6809 BRIAN.MILES@VALIC.COM 2825 EASTLAKE AVE., STE. 220 SEATTLE, WA 98102
	VALIC CHUCK SCHEINBAUM Phone# 206-972-4553 CHUCK.SCHEINBAUM@VALIC.COM 2525 EASTLAKE AVE. E, #220 SEATTLE, WA 98102
	VALIC ILENE SCHEINBAUM Phone# 206972-4553 ILENE.SCHEINBAUM@VALIC.COM 2825 EASTLAKE AVE. E, #220 SEATTLE, WA 98102
WADDELL & REED, INC.	WADDELL & REED, INC LORI SEGAL Phone# 425-455-4020 11811 NE. 1ST ST., STE. 301 BELLEVUE, WA 98005

Please Continue

MERCER ISLAND SCHOOL DISTRICT

Participating 403(b) Investment Providers

Continued

INVESTMENT PROVIDERS	INVESTMENT PROVIDER CONTACTS
WADDELL & REED, INC.	WADDELL & REED, INC. LYNN LANDSTROM Phone# 425-455-4020 11811 NE 1ST. ST, STE. 301 BELLEVUE, WA 98005