

The School District of Volusia County

Approved Tax-Sheltered Annuity and Mutual Funds Companies and Agents

Company	Email Address	Representatives	Phone Numbers
AIG			
		<i>now Corebridge</i>	(800) 448-2542
	lisa.reynolds@corebridgefinancial.com	*Lisa Reynolds	813-388-1589
	scott.satalino@corebridgefinancial.com	*Scott Satalino DVP	813-269-3362
	Anthony.Becker@corebridgefinancial.com	Anthony Becker	407-868-2344
	Bridgette.Silverman@corebridgefinancial.com	Bridgette Silverman	689-986-5432
	john.newton@valic.com	John Newton	(386) 676-0005
American Century Investments			
		DISTRICT REQUIRES PRIOR APPROVAL BEFORE PAYROLL DEDUCTION CAN BEGIN	(800) 345-3533
		*	
Equitable			
			(800) 628-6673
	abel.viteri@equitable.com	*Abel Viteri	(407) 252-6681
	Corbin.Bogeajis@equitable.com	Corbin Bogeajis	(352) 735-0009
	esteban.rondon@equitable.com	Esteban Rondon	321-387-8191
	Jessica.sanzone@equitable.com	Jessica Sanzone	321-443-1590
	john.musick@equitable.com	John Henry Musick	(407) 246-6500
	mason.coffey@equitable.com	Mason Coffey	407-927-4569
	matthew.price@equitable.com	Matthew Price	(407) 921-2282
	michael.morelli@equitable.com	Michael Morelli	386-846-6692
Great American Financial			
		<i>Grandfathered-No New Accounts</i>	(800) 438-3398
	sneperud@gafri.com	*Steve Neperud	(800) 438-3398
	bradh@andersfg.com	Brad Harrison	(386) 402-7811
	dhill@woodburyfinancial.net	David Hill	(386) 983-2418
	eorell@appreciationfinancial.com	Edward Orell	(561) 351-9495
	Hantenage642@cs.com	Richard Hanten CHFC,CLU	(386) 441-9994
	rforton69@gmail.com	Robert Forton	(407) 739-7755
	ronbowles@legendequities.com	Ron Bowles	(386) 736-2515
	rsomers.nrg@gmail.com	Ron Somers	(321) 230-9849

Approval of a company or agent shall not be interpreted as an endorsement by the School Board of the company, agent, or the products they sell.

*Agent of Record

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Company	Email Address	Representatives	Phone Numbers
Life Insurance of the Southwest			National Life Group (800) 579-2878
	TWilliams@NationalLife.com	*Tracee Williams	214-638-9179
	amandabarefield@outlook.com	Amanda Barefield	(386) 689-0714
	beniselaurore@valuteachers.com	Benise Laurore	561-577-9808
	eorell@presfinancial.com	Ed Orell	(561) 351-9495
	greenhousefinancial@hotmail.com	Eldred Lewis	353-256-6739
	jmerced99ffl@gmail.com	Josue Merced	407-765-5105
	kadapurcell@gmail.com	Karen Purcell	(404) 626-9351
	s.krystin@efgconnect.com	Krissy Skoczylas	386-237-4798
	ktetreault@valuteachers.com	Kyle Tetreault	850-766-6734
	ljohnson@appreciationfinancial.com	Lee Johnson	(904) 834-1272
	M.Leggett@corefinancialsvs.com	Mathew Leggett	407-702-3102
	rwilkerson@valuteachers.com	Robert Wilkerson	386-216-6561
	geo@voyageretirement.com	Ruben Camargo	(386) 956-9264
	lifeandretirementpeaceofmind@gmail.com	Sheryl Sisler Moore	407-920-1323
Lincoln Investment Planning			The Legend Group (877) 819-7455
	nicholasgreer@legendequities.com	*Nicholas Greer	(386) 673-1514
	bert_ritter@tsa4u.com	Bert Ritter	(561) 432-5656
	eileen_ritter@tsa4u.com	Eileen Ritter	(561) 432-5656
	fredbarnard@legendequities.com	Lee Barnard	(727) 578-2828
	mgraham@westcoastfinancial.com	Matt Graham	(813) 269-7100
	paul_crisafulli@tsa4u.com	Paul Chrisafulli	(352) 433-0656
Metlife			(800) 492-3553
	swilliams6@metlife.com	*Scott Williams	(407) 310-5779
	anorman@metlife.com	Andrew Norman	(386) 673-9373
	bdyal@metlife.com	Ben Dyal	(386) 673-9373
	dogg@metlife.com	Don Ogg	(407) 782-5051
	psteadman@metlife.com	Paula Steadman	(305) 401-8747
	rmacak@metlife.com	Richard Macak	(407) 393-6688
	slarson@metlife.com	Shane Larson	(386) 673-9373
	steve.hale@valic.com	Stephen Hale, CFP, CLU, CHFC	(386) 307-8499
	telders@metlife.com	Todd Elders	(407) 342-4915

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Company	Email Address	Representatives	Phone Numbers
Plan Member Services			(800) 874-6910
	rrush@planmembersec.com	*Richard Rush	(800) 874-6910
	dpayne@rpaeducator.com	David Payne	407-678-4014
	jvallone@rpaeducator.com	Joe Avallone	407-678-4014
	maria.regeci@planmembersec.com	Maria Regeci	(386) 245-9039
	rewart@planmembersec.com	Ryan Ewart	(386) 689-6601
	tlobasso@rpaeducator.com	Tommy LoBasso	(386) 956-4670
	tshort@planmembersec.com	Tommy Short	(386) 453-6228
Reliastar Life Insurance Co			(850) 226-7688
	ov.williams@ovwilliams.com	*OV Williams	386-254-2925
	bert_ritter@tsa4u.com	Bert Ritter	800-330-4944
	thefortis2006@yahoo.com	Bob Anderson	386-736-7889
	HantenAge642@cs.com	Rich Hanten	386-441-9994
	ryanpate872@msn.com	Ryan Pate	386-254-2925
Security Benefit Group			(800) 888-2461
	jacob.moore@securitybenefit.com	*Jacob Moore	727-543-5098
	daniel@voyagerretirement.com	Daniel Rey	(321) 262-6732
	drew@rosenstockwm.com	Drew DArcy	386-689-3201
	jlhudson@ovwilliams.com	James Hudson	(386) 846-1752
	Jeannine.stecklair@raymondjames.com	Jeannine Stecklair	(386) 427-8245
	jp@flbenefitsgroup.com	JP Aubry	(407) 463-8738
	k.benes-stanely@abmmfinancial.com	Kimberlee Benes-Stanley	321-222-7828
	kevin@voyagerretirement.com	N. Kevin Keefer	(248) 534-9969
	rich@billgrigat.com	Richard Harman	(386) 615-7526
	rich.lepore@abmmfinancial.com	Richard Lepore	561-596-2743
	scott.weidman@jwcemail.com	Scott Weidman	(386) 308-5842
	ssargeant@gwnsecurities.com	Sherwin Sargeant	(407) 616-1693
	steven@rosenstockwm.com	Steven Rosenstock	407-375-1861
	steven.smitten@abmmfinancial.com	Steven Smitten	813-380-7705
	bill@billgrigat.com	William (Bill) Grigat, Jr.	(386) 615-7526

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