

The School Board of Broward County, Florida

Benefits Department

7770 West Oakland Park Blvd., Sunrise, FL 33351 Phone: 754-321-3100

TAX-SHELTERED ANNUITIES **DEFERRED COMPENSATION PLANS**

Revised: June 23, 2026

The following companies are qualified by meeting the requirements established by the Board, to market Tax Sheltered Annuities to School Board employees. **The School Board does not recommend any specific company.** Only the agents listed and possessing School Board-issued Vendor ID badges are authorized access to SBBC's locations and for writing new business. Agents not listed that have had prior business may continue to service existing clients only.

The maximum number of authorized agents/representatives allowed per company has been set at fifteen (15) and are listed herein. This list will be revised on a quarterly basis.

AUTHORIZED VENDOR LIST

EQUITABLE FINANCIAL LIFE INSURANCE COMPANY (FORMERLY AXA)

403(b)/457(b) Annuity/Mutual Funds & Roth Plans

1290 Avenue of Americas
New York, NY 10104
(800) 628-6673

2255 Glades Road, Suite 412-E
Boca Raton, FL 33431-7389
954-772-4300 Ext. 307
Fax: 561-997-7852

Michael Goldberg	(954) 298-9977	michael.goldberg2@equitable.com
Adriana McGrath	(305) 494-5752	adriana.mcgrath@equitable.com
Brandt Shuler	(954) 651-8886	brandt.shuler@equitable.com
Craig Levy	(954) 599-8218	craig.levy@equitable.com

Bryan Braud	(954) 818-5394	bryan.braud@equitable.com
Tristan Saleh	(813) 416-7533	tristan.saleh@equitable.com
Nichole Kelly	(954) 551-7178	nichole.kelly@equitable.com
Michael Arauz	(954) 707-3487	michael.arauz@equitable.com
Nicholas Morales	(786) 338-3168	nicholas.morales@equitable.com
Jonathon Cachon	(954) 397-5537	jonathon.cachon@equitable.com

The Variable Annuity Life (VALIC /Corebridge)
403(b)/457(b) Annuity/Mutual Funds & Roth Plans

Elaine Roberts
Divisional Vice President
4300 West Cypress Street, Suite 425 Tampa, FL
33607
Phone: (813) 269-3362
(800) 448-2542

Brandon Fiske Brandon.Fiske@corebridgefinancial.com 954-547-7231	Karl Ross Karl.Ross@corebridgefinancial.com 728-205-6644
Jacob Holt Jacob.Holt@corebridgefinancial.com 561-590-0454	
Linda Eklof Linda.Eklof@aig.com (754) 228-9401	

LIFE INSURANCE COMPANY OF THE SOUTHWEST (LSW)
403(b)/457(b) Annuity/Mutual Funds & Roth Plans
HOME OFFICE

LSW/NATIONAL LIFE GROUP
15455 Dallas Parkway, Ste.800
Addison, TX 75001 1-866-243-7174

Joseph Chalom	(954) 340-1588	joe@retirementcouncil.com
Andrew Lewis	(949) 701-7365	alewis@appreciationfinancial.com
Christopher Rose	(518) 542-7469	Rose_christopher@nlgrouppmail.com
Joseph Scotti	(941) 932-6592	scotti_joseph@nlgrouppmail.com
Rocio "Rosie" Espinosa	(305) 323-7433	respinosa@valuteachers.com
Indra Arango	(786) 366-2681	iarango@valuteachers.com
Deanna Pelletier	(954) 849-0270	dpelletier@valuteachers.com
Rodrigo Posse	(954) 850-0314	rposse@valuteachers.com
Curtis James	(904) 476-4962	James_curtis@nlgrouppmail.com
Rodney Cooper	(904) 923-5929 / (770) 873-4325	cooper_rodney@nlgrouppmail.com
Saadia Sindhu	(954) 235-3267	sindhu_sadia@nlgrouppmail.com
Chase Bourdeau	954-294-3717	chasebourdeaufl@gmail.com
Vera Jefremovas	(954) 607-9906	vera@valuteachers.com
Clinton Cooper Jr	(786) 366-7002	cjcooper@valuteachers.com
Jeremy "Craig" Story	(904) 864-7743	Craig@vtnmo.com

SUNCOAST CREDIT UNION
403(b)/457(b) Annuity/Mutual Funds & Roth Plans

HOME OFFICE
6801 East Hillsborough Avenue
Tampa, FL 33680
(800) 999-5887

Jesse Burchill	813-772-3003	jesse.burchill@suncoastcreditunion.com
Efrain Toro	813-340-9308	efrain.toro@suncoastcreditunion.com
Jonathan Marler	866-300-9382 ext 86713	jonathan.marler@suncoastcreditunion.com
Sammy Rodriguez	866-300-9382 ext 86772	sammy.rodriguez@suncoastcreditunion.com
Michael Varon	866-300-9382 ext 86768	michael.varon@suncoastcreditunion.com
Malik Alston	866-300-9382 ext 86720	malik.alston@suncoastcreditunion.com
Betty Rauch	866.300.9382 ext. 86788	<u>betty.rauch@suncoastcreditunion.com</u>

INACTIVE STATUS

The following Companies have been moved from Active to Inactive Status as Tax Sheltered Annuity Vendors with The School Board of Broward County, Florida.

The companies listed below are not permitted to present new applications for participation into their products, nor will they receive employee contributions, effective June 1, 2021.

American Century Investments
American Express Financial Advisors
Beneficial Standard Life Insurance Company (CCP Co.)
Columbus Mutual
Concert Investment Series
Connecticut General
CONSECO Variable Insurance Company / Jefferson National
Fidelity Investments
First Investment Annuity Company
First Investors Corporation
Franklin Life
Great American Life Insurance
Gulf Life
The Hartford
Horace Mann
Kansas City Life
The Legend Group
Lincoln Financial Group
Massachusetts General Life
MetLife
National Health Insurance Company National Western
Life Insurance Co.
Nationwide Life Insurance Company
New York Life Insurance Company / MainStay Investments
PESCO
Pioneer Funds Distributor, Inc.
Righttime Fund
Security Benefit Group
TransAmerica
Travelers Insurance Company Zurich Kemper
Investors Life Insurance Co.

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