

The School District of Volusia County

Approved Tax-Sheltered Annuity and Mutual Funds Companies and Agents

Company	Email Address	Representatives	Phone Numbers
AIG			(800) 448-2542
	Elaine.Roberts@corebridgefinancial.com	*Elaine Roberts	863-873-0035
	cameron.obrien@aig.com	Cameron O'Brien	407-482-8831
	drew.darcy@VALIC.com	Drew D'Arcy	(386) 337-1819
	john.newton@valic.com	John Newton	(386) 676-0005
	Steve.hale@valic.com	Steve Hale, CFP,CLU,CFC	(386) 307-8499
	Steven.rosenstock@valic.com	Steven Rosenstock	(407) 375-1861
American Century Investments			(800) 345-3533
DISTRICT REQUIRES PRIOR APPROVAL BEFORE PAYROLL DEDUCTION CAN BEGIN			
*			
Equitable			(800) 628-6673
	abel.viteri@equitable.com	*Abel Viteri	(407) 252-6681
	damon@wmscfl.com	Damon Basco	(407) 760-9968
	David.Findley@equitable.com	David Findley	(561) 335-9484
	donald.quill@axa-advisors.com	Don Quill	(407) 926-2557
	jessica.shane@equitable.com	Jessica Shane	(321) 443-1590
	john.musick@axa-advisors.com	John Henry Musick	(407) 246-6500
	matthew.price@equitable.com	Matthew Price	(407) 921-2282
	steven.pilling@axa-advisors.com	Steve Pilling	(407) 926-2554
Great American Financial			(800) 438-3398
Grandfathered-No New Accounts			
	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			(800) 579-2878
	RMcCarthy@nationallife.com	*Ray McCarthy	904-466-1360
	beniselaurore@valuteachers.com	Benise Laurore	561-577-9808
	eorell@presfinancial.com	Ed Orell	(561) 351-9495
	liz@voyageretirement.com	Elizabeth (Liz) Baker	(407) 221-3018
	jbarolomeo@valuteachers.com	Joseph Bartolomeo	407-902-1670
	jmerced99ffl@gmail.com	Josue Merced	407-765-5105
	kevinscribner81@gmail.com	Kevin Scribner	(407) 948- 6283
	ktetreault@valuteachers.com	Kyle Tetreault	850-766-6734
	nspence@appreciationfinancial.com	Nigel Spence	(561) 319-5197
	s.mcree@dragon-financial.com	Sunnie McRee	386-402-2516
Lincoln Investment Planning			(800) 370-7377
	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
	dmims@planmembersec.com	Derrick Mims	(407) 331-7777
	ewilliams@rpaeducator.com	Emget Williams	407-415-2122
	jvallone@rpaeducator.com	Joe Avallone	407-678-4014
	maria.regeci@planmembersec.com	Maria Regeci	(386) 245-9039
	mwelding@rpaeducator.com	Marina Welding	407-678-4014
	rewart@planmembersec.com	Ryan Ewart	(386) 689-6601
	tshort@planmembersec.com	Tommy Short	(386) 453-6228
Reliastar Life Insurance Co			(850) 226-7688
	HantenAge642@cs.com	*Richard Hanten, CHFC, CLU	386-441-9994
	bert_ritter@tsa4u.com	Bert Ritter	800-330-4944
	thefortis2006@yahoo.com	Bob Anderson	386-736-7889
	ov.williams@ingfp.com	OV Williams	386-254-2925
	jaylen27@netzero.net	Robert Rix	386-254-2925
	ryanpate872@msn.com	Ryan Pate	386-254-2925
	snealy@voyafa.com	Sandra Nealy	386-255-8880
Security Benefit Group			(800) 888-2461
	Chase.Wilson@SecurityBenefit.com	*Chase Wilson	(785) 438-3076
	angel@flbenefitsgroup.com	Angel Simpson	(407) 314-7903
	daniel@voyageretirement.com	Daniel Rey	(321) 262-6732
	jludson@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@voyageretirement.com	N. Kevin Keefer	(248) 534-9969
	rich@billgrigat.com	Richard Harman	(386) 615-7526
	scott.weidman@jwcemail.com	Scott Weidman	(386) 308-5842
	ssargeant@gwnsecurities.com	Sherwin Sargeant	(407) 616-1693
	steven.smitten@abmmfinancial.com	Steven Smitten	813-380-7705
	bill@billgrigat.com	William (Bill) Grigat, Jr.	(386) 615-7526

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