

The School District of Volusia County

Approved Tax-Sheltered Annuity and Mutual Funds Companies and Agents

Company	Email Address	Representatives	Phone Numbers
DISTRICT REQUIRES PRIOR APPROVAL BEFORE PAYROLL DEDUCTION CAN BEGIN			
American Century Investments			(800) 345-3533
		*	
AXA			
			(800) 628-6673
	steven.pilling@axa-advisors.com	*Steve Pilling	(407) 926-2554
	damon@wmcsfl.com	Damon Basco	(407) 760-9968
	donald.quill@axa-advisors.com	Don Quill	(407) 926-2557
	john.musick@axa-advisors.com	John Henry Musick	(407) 246-6500
Great American Financial			
			(800) 438-3398
	snepesud@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
ING (Northern Life Insurance Co)			
			(877) 884-5050
	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

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
	jmarley@nationallife.com	*Jacob Marley	(800) 906-3310
	alex.xavier.cordero@gmail.com	Alex Cordero	(321) 352-0755
	brooks@valuteachers.com	Brook Stealey	(407) 217-3264
	cangelica@valuteachers.com	Christopher Angelica	(614) 937-8725
	davidgalagarza@gmail.com	David Galagarza	(407) 668-7692
	liz@voyageretirement.com	Elizabeth (Liz) Baker	(407) 221-3018
	jphillips67@gmail.com	James Phillips	(321) 276-3250
	jluthe@appreciationfinancial.com	Joseph Luthe	(321) 848-3532
	kevinscribner81@gmail.com	Kevin Scribner	(407) 948- 6283
	tetreault00@hotmail.com	Kyle Tetreault	(850) 766-6734
	lerd@valuteachers.com	Lisa Erd	(386) 290-3843
	keefee@mantaafp.com	N. Kevin Keefer	(248) 534-9969
	sunnie@themarkanthonygroup.com	Sunnie McRee	(386) 402-2516
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
Plan Member Services			(800) 874-6910
	rrush@planmembersec.com	*Richard Rush	(800) 874-6910
	danny@rpaeducator.com	Danny Gay	(407) 599-2300
	david@rpaeducator.com	David Payne	(407) 678-4014
	dmims@planmembersec.com	Derrick Mims	(407) 331-7777
	Emget@rpaeducator.com	Emget Williams	(407) 415-2122
	jimsmith@planmember.com	James Smith	(407) 766-8648
	joe@rpaeducator.com	Joe Avallone	(407) 678-4014
	maria@rpaeducator.com	Maria Regeci	(386) 439-6591
	marina@rpaeducator.com	Marina Welding	(407) 678-4014
	rewart@planmembersec.com	Ryan Ewart	(386) 689-6601
	tshort@planmembersec.com	Tommy Short	(386) 453-6228

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Company	Email Address	Representatives	Phone Numbers
Security Benefit Group			(800) 888-2461
	Kaydi.hooker@securitybenefit.com	*Kaydi Hooker	(785) 438-3076
	angel@flbenefitsgroup.com	Angel Simpson	(407) 314-7903
	daniel@voyageretirement.com	Daniel Rey	(321) 262-6732
	ericka.delapaz@abmmfinancial.com	Ericka de la Paz	(386) 301-5580
	Jeannine.steckclair@raymondjames.com	Jeannine Steckclair	(386) 427-8245
	JSchechtman@financialguide.com	Jeff Schechtman	(561) 315-2022
	jp@flbenefitsgroup.com	JP Aubry	(407) 463-8738
	rich@billgrigat.com	Richard Harman	(386) 615-7526
	robert@voyageretirement.com	Robert Forton	(407) 739-7755
	scott.weidman@jwcemail.com	Scott Weidman	(386) 308-5842
	ssargeant@gwnsecurities.com	Sherwin Sargeant	(407) 616-1693
	bill@billgrigat.com	William (Bill) Grigat, Jr.	(386) 615-7526
The Legend Group			(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
	jameslauro@legendequities.com	James Lauro	(407) 342-8355
	fredbarnard@legendequities.com	Lee Barnard	(727) 578-2828
	hernandez@tsa4u.com	Maria Hernandez	(800) 330-4944
	mgraham@westcoastfinancial.com	Matt Graham	(813) 269-7100
	nhenwood@lincolninvestment.com	Nathan Henwood	(386) 214-8275
		PatrickFallon	
	paul_crisafulli@tsa4u.com	Paul Chrisafulli	(352) 433-0656
VALIC			(800) 448-2542
	vince_sorrentino@valic.com	*Vince Sorrentino	(407) 482-8831
	drew.darcy@VALIC.com	Drew D'Arcy	(386) 337-1819
	john.newton@valic.com	John Newton	(386) 676-0005
	Mark.Chinoda@valic.com	Mark Chinoda	(407) 482-8831
	Steve.hale@valic.com	Steve Hale, CFP,CLU,CFC	(386) 307-8499
	Steven.rosenstock@valic.com	Steven Rosenstock	(407) 375-1861

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Company	Email Address	Representatives	Phone Numbers
Waddell & Reed			(888) 923-3355
	djohnson04@wradvisors.com	*Dustin Johnson	(850) 894-9950
	alpike@wradvisors.com	Anthony Pike	(407) 916-7700
	mvonberg@wradvisors.com	Michael Von Berg	(321) 203-7363
	reckert@wradvisors.com	Ryan Eckert	(800) 916-7700

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