

List of Authorized 403(b) & 457 Providers for Bay District Schools

403(b) Product Providers:

	Investment Provider		Authorized Representative	Phone
12-001	ReliaStar Life Subsidiary of VOYA Financial (Fixed Annuities)	1-813-541-1213	Bert Ritter Ted Haney John Messer John Hludinski Kenneth Brookins Stephen Ayers Alice Faye Marshall	800-330-4944 (850) 763-1783 (850) 872-1840 800-330-4944 (850) 215-4803 (850) 215-4803 (850) 643-8577
12-003	Horace Mann Insurance Co. (Fixed & Variable Annuities)	1-800-999-1030	Wendy Varnum	(850) 769-8030
12-004	Corebridge Financial (Formerly AIG Retirement/VALIC) (Variable Annuities)	1-800-448-2542	Otis Thames Kimberly Thomas	(850) 443-8048 (850) 363-7744
12-006	Equitable (Variable Annuities)	1-800-628-6673	Les Brackett Jerry Sowell Robert Neale Nicole Koehler Luke Koehler	(850) 763-0308 (850) 763-0308 (850) 892-5423 (919) 719-8367 (704) 540-2927
12-011	Metropolitan Life Insurance Brighthouse (Variable Annuities)	1-800-504-0740	Kristina Elgee Gail Milon	(850) 774-1157 (850) 591-4010
12-034	Midland National Life (Variable Annuities)	1-877-586-0240	Tommy Currid Tiffany Currid Danny Mitchell Frank Rossetti Michael Rossetti Samuel Alfred Shelton King Misty Hicks	(850) 897-4964 (850) 897-4964 (850) 319-7007 (352) 293-2972 (352) 293-2972 (407) 937-8791 (904) 438-1687 (863) 602-8530
12-037	IPX American Century Services (Mutual Funds - No Load)	1-844-788-3474 Ext 5	www.americancentury.com/florida	

403(b) Product Providers (Continued):

Page 2

12-038	National Life Group (Equity Index Annuities)	1-800-579-2878	Gary Tetreault	(386) 478-9106	
			Brandon Holmes	(904) 575-1232	
			Brandon Kent	(334) 790-5933	
			Timothy Myers	(334) 714-8793	
			Michael Croslow	(501) 599-8245	
			Wade Elston	(303) 946-8586	
			Joshua Bogaards	(954) 258-6984	
			Casey Morel	(850) 260-5171	
12-039	PlanMember Services (Mutual Funds - Load)	1-800-874-6910	Virginia Lind	(850) 862-5511	
			Ryan Ewart	(386) 689-6601	
			Rodney Roberts	(850) 384-1618	
			Matt Mendenhall	(321) 299-8099	
			Andrew Vick	(850) 688-2716	
12-026	Franklin Templeton (Mutual Funds)	1-800-527-2020			
			Harbor Financial	John Johnson	(850) 215-0800
			Wells Fargo Advisors LLC	Joseph (Alan) McCurley	(850) 785-0273
			Wells Fargo Advisors LLC	Kelly Bonner	(850) 785-0273
			Wells Fargo Advisors LLC	Hal Burleson, Jr.	(850) 785-0273
			Wells Fargo Advisors LLC	Jared Burleson	(850) 785-0273
			Benjamin F. Edwards & Co.	Malissa Romack	(850) 769-7053
			Benjamin F. Edwards & Co.	Lolita Nettles	(850) 769-7053
			Edward Jones	Richard Filippi	(850) 265-5040
			Edward Jones	Harry Henning	(850) 769-9569
			Edward Jones	Carlton Stabler	(850) 785-2558
			Edward Jones	Michael Calidonna	(850) 233-2089
			Edward Jones	Jaye Chapman	(850) 769-1278
			Raymond James	Heather Noyes	(850) 785-9614
			Raymond James	Billy Stevenson	(850) 785-9614
			LPL Financial	Steven Moss	(850) 249-5304
			LPL Financial	Patricia Borinski	(850) 215-3829
			Osaic	Philip Cunningham III	(850) 238-8806
			Shean Wealth Management	Beverly Shean	(850) 785-9614
			Premier Coast Advisors	Todd Zaborski	(850) 730-1053
			Premier Coast Advisors	Doug Fontaine	(850) 730-1053
			Catalyst Wealth Management	Coleman Davis	(832) 615-2712
12-045	Security Benefit Group (Mutual Funds - Load)	1-800-888-2461	Mark Jordan	(334) 794-8219	
			Joseph Hamner	(850) 819-7119	
			Eddie Alicea	(888) 501-3063	

457 Product Providers:

Page 3

Investment Provider			Authorized Representative	Phone
12-019	Corebridge Financial (Formerly AIG Retirement/VALIC)	1-800-448-2542	Otis Thames	(850) 443-8048
			Kimberly Thomas	(850) 363-7744
12-040	Horace Mann Insurance Co.	1-800-999-1030	Wendy Varnum	(850) 769-8030
12-042	Equitable	1-800-628-6673	Les Brackett	(850) 763-0308
			Jerry Sowell	(850) 763-0308
			Nicole Koehler	(919) 719-8367
			Luke Koehler	(704) 540-2927
12-043	PlanMember Services	1-800-874-6910	Virginia Lind	(850) 862-5511
			Ryan Ewart	(386) 689-6601
			Rodney Roberts	(850) 384-1618
			Matt Mendenhall	(321) 299-8099
			Andrew Vick	(850) 688-2716
12-044	National Life Group	1-800-579-2878	Gary Tetreault	(386) 478-9106
			Brandon Holmes	(904) 575-1232
			Brandon Kent	(334) 790-5933
			Timothy Myers	(334) 714-8783
			Michael Croslow	(501) 599-8245
			Wade Elston	(303) 946-8586
			Joshua Bogaards	(954) 258-6984
			Casey Morel	(850) 260-5171
12-046	Security Benefit Group	1-800-888-2461	Joseph Hamner	(850) 819-7119
			Eddie Alicea	(888) 501-3063

Roth 403(b) Product Providers: After-Tax

Investment Provider			Authorized Representative	Phone
15-001	PlanMember Services	1-800-874-6910	Virginia Lind	(850) 862-5511
			Ryan Ewart	(386) 689-6601
			Rodney Roberts	(850) 384-1618
			Matt Mendenhall	(321) 299-8099
			Andrew Vick	(850) 688-2716
15-002	Corebridge Financial (Formerly AIG Retirement/VALIC)	1-800-448-2542	Otis Thames	(850) 443-8048
			Kimberly Thomas	(850) 363-7744

Investment Provider		Authorized Representative		Phone
15-003	Horace Mann Insurance Co.	1-800-999-1030	Wendy Varnum	(850) 769-8030
15-004	National Life Group (Equity Index Annuities)	1-800-579-2878	Gary Tetreault Brandon Holmes Brandon Kent Timothy Myers Michael Croslow Wade Elston Joshua Bogaards Casey Morel	(386) 478-9106 (904) 575-1232 (334) 790-5933 (334) 714-8793 (501) 599-8245 (303) 946-8586 (954) 258-6984 (850) 260-5171
15-005	Franklin Templeton (Mutual Funds)	1-800-527-2020	Harbor Financial Wells Fargo Advisors LLC Wells Fargo Advisors LLC Wells Fargo Advisors LLC Wells Fargo Advisors LLC Benjamin F. Edwards & Co. Benjamin F. Edwards & Co. Edward Jones Edward Jones Edward Jones Edward Jones Edward Jones Raymond James Raymond James LPL Financial LPL Financial Osaic Shean Wealth Management Premier Coast Advisors Premier Coast Advisors Catalyst Wealth Management	John Johnson Joseph (Alan) McCurley Kelly Bonner Hal Burleson, Jr. Jared Burleson Malissa Romack Lolita Nettles Richard Filippi Harry Henning Carlton Stabler Michael Calidonna Jaye Chapman Heather Noyes Billy Stevenson Steven Moss Patricia Borinski Philip Cunningham III Beverly Shean Todd Zaborski Doug Fountaine Coleman Davis
15-006	Security Benefit Group	1-800-888-2461	Joseph Hamner Eddie Alicea	(850) 215-0800 (850) 785-0273 (850) 785-0273 (850) 785-0273 (850) 785-0273 (850) 769-7053 (850) 769-7053 (850) 265-5040 (850) 769-9569 (850) 785-2558 (850) 233-2089 (850) 769-1278 (850) 785-9614 (850) 785-9614 (850) 249-5304 (850) 215-3829 (850) 238-8806 (850) 785-9614 (850) 730-1053 (850) 730-1053 (832) 615-2712 (850) 819-7119 (888) 501-3063