

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

403(b) Product Providers:

	Investment Provider	Phone	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	(850) 763-0308 (850) 763-0308 (850) 892-5423
12-011	Metropolitan Life Insurance Bighthouse (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 Joshua Bogaards	(850) 897-4964 (850) 897-4964 (850) 319-7007 (352) 293-2972 (352) 293-2972 (407) 937-8791 (904) 438-1687 (954) 258-6984
12-037	IPX American Century Services (Mutual Funds - No Load)	1-844-788-3474 Ext 5	www.americancentury.com/florida	
12-038	National Life Group (Equity Index Annuities)	1-800-579-2878	Gary Tetreault Brandon Holmes Brandon Kent Timothy Myers Michael Croslow Wade Elston	(386) 478-9106 (904) 575-1232 (334) 790-5933 (334) 714-8793 (501) 599-8245 (303) 946-8586
12-039	PlanMember Services (Mutual Funds - Load)	1-800-874-6910	Virginia Lind Ryan Ewart Rodney Roberts Matt Mendenhall Andrew Vick	(850) 862-5511 (386) 689-6601 (850) 384-1618 (321) 299-8099 (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 Fountaine	(850) 730-1053

12-045 Security Benefit Group
(Mutual Funds - Load)

1-800-888-2461

Granville Knowles	(888) 616-5333
Mark Jordan	(334) 794-8219
Joseph Hamner	(850) 819-7119

457 Product Providers:

	Investment Provider		Authorized Representative	Phone
12-019	Corebridge Financial (Formerly AIG Retirement/VALIC)	1-800-448-2542	Otis Thames Kimberly Thomas	(850) 443-8048 (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 Jerry Sowell	(850) 763-0308 (850) 763-0308
12-043	PlanMember Services	1-800-874-6910	Virginia Lind Ryan Ewart Rodney Roberts Matt Mendenhall Andrew Vick	(850) 862-5511 (386) 689-6601 (850) 384-1618 (321) 299-8099 (850) 688-2716
12-044	National Life Group	1-800-579-2878	Gary Tetreault Brandon Holmes Brandon Kent Timothy Myers Michael Croslow Wade Elston	(386) 478-9106 (904) 575-1232 (334) 790-5933 (334) 714-8783 (501) 599-8245 (303) 946-8586
12-046	Security Benefit Group	1-800-888-2461	Joseph Hamner	(850) 819-7119

Roth 403(b) Product Providers: (After-Tax)

	Investment Provider		Authorized Representative	Phone
15-001	PlanMember Services	1-800-874-6910	Virginia Lind Ryan Ewart Rodney Roberts Matt Mendenhall Andrew Vick	(850) 862-5511 (386) 689-6601 (850) 384-1618 (321) 299-8099 (850) 688-2716
15-002	Corebridge Financial (Formerly AIG Retirement/VALIC)	1-800-448-2542	Otis Thames Kimberly Thomas	(850) 443-8048 (850) 363-7744
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	(386) 478-9106 (904) 575-1232 (334) 790-5933 (334) 714-8793 (501) 599-8245 (303) 946-8586

15-005 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 Fountaine	(850) 730-1053

08/26/2024