

The School Board of Broward County, Florida

Benefits Department

7770 West Oakland Park Blvd., Sunrise, FL 33351

Phone: 754-321-3100 Fax: 754-321-3280

**TAX SHELTERED ANNUITIES/ROTH FEATURE
DEFERRED COMPENSATION PLANS**

Revised: 01/01/2019

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

AXA EQUITABLE LIFE AND ADVISORS, LLC

403(b), 457(b) & Roth Plans

1290 Avenue of Americas
New York, NY 10104
212-314-4000 Fax: 201-583-2683

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
Mario Basilone	(954) 772-4300
Nicholas Baurichter	(954) 772-4300
Bryan Braud	(954) 772-4300
Todd Dorsey	(954) 772-4300
Matthew Arbucci	(941) 313-1061
Craig Levy	(954) 772-4300
Ryan McLain	(954) 772-4300
Adrianna McGrath	(954) 772-4300
Yves Moon	(407) 756-9203
David Sosa	(954) 980-3352
Brandt Shuler	(954) 772-4300
Lenny Tomson	(954) 772-4300
Ruth Wilson-Brooks	(954) 772-4300

METLIFE RESOURCES
ROTH & Mutual Fund

301 E. Pine Street, Suite 810
Orlando, Florida 32801
800-763-2838

Stephanie Brandon	(954) 625-1540
John Bresset	(954) 531-1954
Eileen Cioe	(954) 331-5100
Christopher Crisolongo	(954) 331-5040
Brett DiPasquale	(954) 331-5102
Stephanie Gordon	(561) 886-3373
Barbara Hunter	(561) 207-2300
David Jones	(954) 625-1586
Jean Lysee	(954) 520-4847
Laurie Madenfort	(954) 331-5089
Claudia Marcus	(954) 625-1543
Shalom Moldavski	(954) 331-5033
Veronica Noel	(954) 850-0788
Kirk Padilla	(954) 625-1636
Julius Pappas	(954) 625-1582

VALIC
403(b), 457(b) & Roth Plans

DAVID M. ALLEN, CFP, SENIOR DISTRICT MANAGER
1800 N. MILITARY TRAIL, STE 340
BOCA RATON, FL 33431
Phone: (561) 684-3775
Fax: (561) 684-5768

David M. Allen, CFP	(561) 684-3775
Ross Brenner	(561) 972-0588
Linda Eklof	(954) 496-5344
Alexandra Frederique	(954) 415-7345
Rebecca Johns	(954) 809-1635
Jason Oestreicher, CFP	(954) 547-9161
Steve Proffitt	(954) 684-6306
Steve Sallee	(954) 802-4060
Michael J. Smith	(646) 872-0318
Michael R. Smith	(561) 322-0806
Sherry Stull-Klein, CFS	(561) 302-5394
Samita Thephasit	(954) 263-6431
Ralph Tumolo	(954) 701-1819
Paul Tunink	(954) 809-8485

VOYA/ING
403(b), 457(b) & Roth Plans

Keistra Ransom, Agent of Record
Phone: (813) 281-3743

David Arden	(954) 940-7656
Armando Blondin	(954) 389-9400
Shawn Flynn	(954) 632-1680
Stephen Greenberg	(954) 389-9400
Ryan Hasey	(561) 549-0804
Noah Kahn	(954) 689-9401
Richard Koblick	(561) 314-1801
Taylor Kollen	(786) 313-3995
Brandon Moe	(954) 689-9401
Anthony Oliveri	(561) 443-5510
Ralph Tumolo	(954) 724-4774
Ivan Usztics	(561) 362-2260

INACTIVE STATUS

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

This action has been taken as a result from RFP-23-089V Tax Sheltered Annuity Programs for School Board Employees. The listed companies below are no longer permitted to present new applications for participation into their products but are still permitted to service existing clients.

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
Life Insurance of the Southwest (LSW)
Massachusetts General Life
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.