



CASA GRANDE
ELEMENTARY
SCHOOL DISTRICT #4

APPROVED 403(b) & 457(b) ADVISORS

ASpire Financial Services 403(b), 403(b)Roth, & 457(b) 866.634.5873	Robert Miller 520.560.4758 robert.miller@edwardjones.com
Cetera-MG Trust Company-PenSelect 403(b), 403(b)Roth, & 457(b) 803.354.5003	Montse Terepocki 602.841.2627 ext.217 montse.terepocki@ceterainvestors.com
Corebridge Financial (formerly AIG Retirement Services-VALIC) 403(b), 403(b)Roth, & 457(b) 800.448.2542	Martha Reynoso 480.262.8533 martha.reynor@aig.com
Equitable 403(b), 403(b)Roth, & 457(b) 800.628.6673	Mateja McKim 480.818.7707 mateja.mckim@equitable.com
Fiduciary Trust Company of New Hampshire 403(b), 403(b)Roth, & 457(b) 877.500.9590	Tex (Austin) Sigris 623.850.0016 tex@121ws.com
GLP Investment and Universal Retirement 403(b), 403(b)Roth, & 457(b)	702.968.8352
GWN Securities 403(b), 403(b)Roth, & 457(b) 561.472.2700	Todd Sepp 520.240.8973 toddsepp@retirementplanprofessionals.com
Metropolitan Life Insurance Company 403(b) & 403(b)Roth 800.504.0740	Tim Whitney 602.569.9542 tim.whitney@goldbookfinancial.com
PlanMember Services 403(b), 403(b)Roth, & 457(b) Client Services Center	800.874.6910
Security Benefit Group 403(b), 403(b)Roth, & 457(b) 800.888.2461	Kim Aranda 602.291.7197 kim.aranda@lpl.com
The Legend Group-A Lincoln Investment Co. 403(b), 403(b)Roth, & 457(b) 888.883.6710	Clifford Hudson 877.469.7377 ext.810 chudson@lincolninvestment.com
VOYA Financial 403(b), 403(b)Roth, & 457(b) 800.584.6001	Nancy Bakshi 520.639.2677 nancy.bakshi@voyafa.com

Casa Grande Elementary School District does not recommend any one particular authorized investment provider or advisor. This list is being provided based on those advisors that are currently working in the district or in the surrounding area. If a local contact name is not provided, please contact the 1-800 customer service numbers supplied. If you have a current advisor that is not listed, you may continue to work with the advisor of your choice.