

403(b) and 457(b) Local Advisor Contact List
Isaac School District

AIG (formerly VALIC)

1-800-426-3753

◆ Shane Russell (480)253-8676 Shane.russell@aig.com

AXA EQUITABLE LIFE INSURANCE COMPANY

1-800-628-6673

◆ Ben Campau (714) 270-8328 Ben.campau@axa-advisors.com

GREAT AMERICAN

1-800-854-3649

◆ Joseph Brekan (480) 922-2830 jbrekan@educatingeducators.com

HORACE MANN

1-800-999-1030

◆ Barrett Latham (480) 268-0960 barrett.latham@horacemann.com

LINCOLN INVESTMENT

The Legend Group – A Lincoln Investment Company

1-888-883-6710

◆ Ernest Albino (602) 686-6570 X 803 ealbino@lincolninvestment.com
◆ Adam Pearce (602) 686-6570 Adam@retirement-professionals.com

METLIFE COMPANIES

1-800-560-5001/ 1-800-492-3553

◆ Tim Whitney (602) 569-9542 twhitney@goldbookfinancial.com

NATIONAL LIFE GROUP

1-800-579-2878

◆ Stephanie Schultz (480) 430-6558 sschultz@appreciationfinancial.com

PLANMEMBER SERVICES

1-800-874-6910

◆ George Fraunces (623) 850-0016 georgef@121ws.com

SECURITY BENEFIT LIFE

1-800-888-2461

◆ Jeff Wilhelm (602) 283.58.73 jwilhelms@lincolninvestment.com

VOYA

1-800-754-6133

◆ John Bartimoccia (623) 341-4923 jbartimoccia@investsji.com

Isaac 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.

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