

403(b) and 457(b) Advisor Contact List
Maricopa Unified School District

CETERA-MG TRUST COMPANY-PENSELECT (Formerly Foresters)

1-800-423-4026

◆ Stu Johnson (602) 841-2627 x 123 Stuart.johnson@ceterais.com

EQUITABLE LIFE INSURANCE COMPANY (Formerly AXA Equitable)

1-800-628-6673

◆ Richard McEachran (480) 518-5447 richard.mceachran@Axa-Advisors.com

LINCOLN INVESTMENT PLANNING/THE LEGEND GROUP

(800) 242-1421 / 1-888-883-6710

◆ Peter Giannetta (480) 877-0336 pgiannetta@lincolninvestment.com

METLIFE COMPANIES

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

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

NATIONAL LIFE GROUP (Formerly Life Insurance of the Southwest)

1-800-579-2878

◆ Caden Henderson (435) 525-5609 chenderson@ipcfinancial.net

PLANMEMBER SERVICES

1-800-874-6910

◆ Gavin Jensen (480) 390-1495 gavin@121ws.com

SECURITY BENEFIT LIFE

1-800-888-2461

◆ Jeff Wilhelms (602) 283-5873 jwilhelms@lincolninvestment.com

VOYA formerly (ING LIFE INSURANCE AND ANNUITY COMPANY)

1-800-754-6133

◆ Robert Neve (602) 759-6737 rneve@sjj.us.com

Grandfathered Investment Provider

****No New Participant Account can be opened. Current participants only****

GREAT AMERICAN - 1-800-854-3649

◆ Joseph Brekan (480) 922-2830 jbrekan@educatingeducators.com
◆ Jeff Wilhelms (602) 283-5873 jwilhelms@lincolninvestment.com

Maricopa Unified 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.

Revised 11/19/21