



APPROVED 403(b) & 457(b) ADVISORS

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Equitable 403(b) & 403(b)Roth 800.628.6673	Richard McEachran 480.518.5447 Richard.mceachran@axa-advisors.com
Fiduciary Trust Company of New Hampshire 403(b), 403(b)Roth & 457(b) 877.500.9590	Gavin Jensen 480.390.1495 gavin@121ws.com
IPX-FPS 403(b) & 403(b)Roth	844.788.3474 ext. 5
Lincoln Investment Planning, LLC 403(b) & 403(b)Roth 800.242.1421/888.883.6710	Peter Giannetta 480.877.0336 pgiannetta@lincolninvestment.com Kimberly Myers 928.499.8599 kmyers@lincolninvestment.com
Metropolitan Life Insurance Company 403(b), 403(b)Roth, & 457(b) 800.560.5001/800.492.3553	Tim Whitney 602.569.9542 twhitney@goldbookfinancial.com
National Life Group 403(b), 403(b)Roth, & 457(b) 800.579.2878	Caden Henderson 435.525.5609 chenderson@ipcfinancial.net
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	Jeff Wilhelms 602.283.5873 jwilhelms@lincolninvestment.com
The Legend Group-A Lincoln Investment Co. 403(b)	888.883.6710
VOYA Financial 403(b), 403(b)Roth & 457(b) 800.584.6001	Nancy Bakshi 520.639.2677 nancy.bakshi@voyafa.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.



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GRANDFATHERED INVESTMENT PROVIDER	<u>CURRENT PARTICIPANTS ONLY</u> <i>"No new accounts may be opened"</i>
Great American 800.854.3649	Joseph Brekan 480.922.0830 jbrekan@educatingeducators.com Jeff Wilhelms 602.2835873 Jwilhelms@lincolninvestment.com

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