

Tolleson Elementary
School District



403(b) & 457(b) ADVISOR CONTACT LIST

Brighthouse Life Insurance Company 403(b), 403(b)Roth & 457(b)	800.638.5433
Cetera-MG Trust Company-PenSelect 403(b), 403(b)Roth & 457(b) 803.354.5003	Christopher Scartz 602.841.2627 ext. 211 Christopher.scartz@firstinvestors.com
Corebridge Financial (formerly AIG Retirement Services-VALIC) 403(b), 403(b)Roth & 457(b) 800.426.3753	Robert Filmore 480.244.8943 robert.filmore@aig.com
Equitable 403(b), 403(b)Roth & 457(b)	800.628.6673
Fidelity Investments 403(b), 403(b)Roth & 457(b) Self-Directed Participant Service Center	1.800.343.348/1.800.343.0860
Fiduciary Trust Company of New Hampshire 403(b), 403(b)Roth & 457(b) 877.500.9590	Robert Young 623.850.0016 robert@121ws.com
Horace Mann Insurance Company 403(b), Roth 403(b) & 457(b) 800.999.1030	Eric Fitzgerald 623.386.7570/800.999.1030 eric.fitzgerald@horacemann.com
Metropolitan Life/Brighthouse Life 403(b), 403(b)Roth & 457(b) 800.560.5001	Tim Whitney 602.569.9542 twhitney@goldbookfinancial.com
National Life Group 403(b), Roth 403(b) & 457(b) 800.579.2878	Stephanie Schultz 480.430.6558 sschultz@appreciationfinancial.com Bonnie Tercero 602.999.8698 btercero@tercerofinancialservices.com
PlanMember Services 403(b), Roth 403(b) & 457(b) Client Services Center	800.874.6910

Tolleson Elementary 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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Security Benefit Group 403(b), Roth 403(b) & 457(b) 800.888.2461	Evelyn Contreras 480.482.9242 evelyn.contreras@lpl.com
VOYA Financial 403(b), 403(b)Roth & 457(b) 800.754.6133	Dawn Depner 480.864.9864 dawn.depner@voyafa.com Nick Depner 480.864.9839 nick.depner@voyafa.com

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