

Tolleson Union High School District
Local Advisor List
403(b) and 457(b) Retirement Plan

VENDOR	REPRESENTATIVE	EMAIL	CONTACT NO.
AIG (VALIC)	Bobbi Langan	Bobbi.langan@aig.com	480-290-0301
Ameriprise Financial	Service Center	https://www.ameriprise.com/	1-800-862-7919
Aspire Financial	Doug DeMuth	doug.demuth@edwardjones.com	623-551-0523
AXA Equitable	Philip Kim	Philip.Kim@axa-advisors.com	480-444-3782
	Bryson Fisher	bryson.fisher@axa-advisors.com	480-444-3720
Fidelity Investment	Self-Directed	Participant Service Center	1-800-343-0860
Foresters Financial	Kevin Hofberger	kevin.hofberger@foresters.com	602-841-2627 x215
Great American (Current Participants Only)	Gavin Jensen	gavin@121ws.com	480-649-3995
Metropolitan Life Ins. & Brighthouse Life Ins.	Tim Whitney	twhitney@goldbookfinancial.com	602-569-9542
	Victoria Thomas	VictoriaThomas@financialguide.com	480-638-2178
Midland National Life	Service Center	https://www.midlandnational.com/	1-877-586-0240
National Life Group	Ken McCormick	KMcCormick@tpensions.com	602-743-4935
	Bonnie Tercero	btercero@tercerofinancialservices.com	602-999-8698
New York Life	Daniel Lindblad	dlindblad@ft.newyorklife.com	623-583-5940
Oppenheimer Funds	Zoe Alexander	zoe.alexander@lpl.com	602-788-6217
PFS Investments (Primerica)	Bob Gastellum	rgaste5000@aol.com	520-770-9205
PlanMember Services	Robert Young	robert@121ws.com	602-686-5300
	Gavin Jensen	gavin@121ws.com	480-649-3995
ReliaStar Life-Voya	Jerry Garza	ggarza@sjj.us.com	602-419-3247
The Legend Group-A Lincoln Investment Co.	Adam Pearce	adampearce@legendequities.com	602-686-6570

Security Benefit	Adam Pearce	adampearce@legendequities.com	602-686-6570
	Teena Dreesen	teenadreesen@ofgfinancial.com	602-750-5885

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Tolleson Union High 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.