

**ST LUCIE COUNTY SCHOOL BOARD  
TAX-SHELTERED ANNUITY COMPANIES**

Page 1 of 2

AMERICAN CENTURY INVESTMENTS (1)  
4500 MAIN ST  
KANSAS CITY, MO 64111  
(800) 345-3533

AXA EQUITABLE (1)  
INDIVIDUAL ANNUITY CENTER  
P.O. BOX 2996  
NEW YORK, NY 10116-2996  
800-628-6673

**LOCAL REPRESENTATIVE\***

- TIM MCMANUS  
KLIP KLUEPPELBERG  
AL SORICELLI  
1100 SW ST. LUCIE WEST BLVD  
PORT ST. LUCIE, FL 34986  
772-878-1181
- RYAN MCLAIN  
2255 GLADES ROAD, SUITE 412E  
BOCA RATON, FL 33431  
561-961-9343

LIFE INSURANCE CO. OF THE  
SOUTHWEST(2), (4)  
P.O. BOX 569080  
DALLAS, TX 75356-9080  
800-579-2878

**LOCAL REPRESENTATIVES:\***

MICHAEL & CAROL D'ANGELO  
3366 SE EAST SNOW ROAD  
PORT ST. LUCIE, FL 34984  
772-879-1720  
[tcfcorp@bellsouth.net](mailto:tcfcorp@bellsouth.net)

BERNARD NICK LECHER  
ELIZABETH LECHER  
2158 SE ALDEN ST  
PORT ST LUCIE, FL 34984  
772-340-4277  
[3fi@bellsouth.net](mailto:3fi@bellsouth.net)

JORGE GONZALEZ  
1961 NW 150<sup>TH</sup> AVE., STE 202  
PEMBROKE PINES, FL 33028  
(954) 392-9797  
[Jgonza3589@aol.com](mailto:Jgonza3589@aol.com)

LIFE INSURANCE CO. OF THE  
SOUTHWEST(2), (4)  
(continued)  
LOCAL REPRESENTATIVE

Kevin Walker  
1472 Holland St.  
Melbourne, Fl. 32935  
[krwalker82@gmail.com](mailto:krwalker82@gmail.com)

MICHAEL "PAT" DRAGON  
1259 MARINA POINT #309  
CASSELBERRY, FL 32707  
407-232-4899

JOHN CASAS  
201 SW PALM DRIVE, APT. 103  
PORT ST. LUCIE, FL 34986  
(772) 626-9553  
[johncasas@hotmail.com](mailto:johncasas@hotmail.com)

PLANMEMBER FINANCIAL  
CORPORATION (1)  
6187 CARPINTERIA AVE  
CARPINTERIA, CA 93013  
1-800-874-6910

**LOCAL REPRESENTATIVES**

DALE CLARK (772) 286-5426  
[dale\\_clark@planmembersec.com](mailto:dale_clark@planmembersec.com)  
DIANE CLARK (772) 286-5426  
[Diane\\_clark@planmembersec.com](mailto:Diane_clark@planmembersec.com)  
JAIME PLANELLS (407) 252-2552  
[jplanells@planmembersec.com](mailto:jplanells@planmembersec.com)  
DON ANDERS (407) 212-2889  
[don@bluehousefinancial.com](mailto:don@bluehousefinancial.com)

VALIC (2)  
VARIABLE ANNUITY LIFE INS  
HOUSTON, TX 77253-3206  
800-369-0314  
**LOCAL REPRESENTATIVES\***  
JIM MCCUDDEN  
[Jim.mccudden@valic.com](mailto:Jim.mccudden@valic.com)  
900 SE Ocean Blvd., Suite 232-D

- (1) Company provides 403(b) plans only
- (2) Company provides both 403(b) and 457 plans.
- (3) Company provides 457 plans only
- (4) Company not available to new or returning employees for 403(b). Open only to existing clients & SLCSB employees as of 8/31/08 for 403(b)s, and open for any employee for 457 plan.

**IMPORTANT NOTE:**

"Local Representatives" are listed solely to assist employees who wish to speak to a local contact person. The listing of a representative does NOT imply that the School Board endorses them in any way, does not imply that the representative is the only local agent of the tax-sheltered annuity provider, and does not imply that the employee must contact a local representative in order to open a tax-sheltered annuity account. The School Board does not endorse any provider or representative. The choice of a tax-sheltered annuity provider is entirely the responsibility of the employee.

**ST LUCIE COUNTY SCHOOL BOARD  
TAX-SHELTERED ANNUITY COMPANIES**

Page 2 of 2

Stuart, FL 34994  
(772) 600-2662  
(772) 418-5031

[fjackson@legendgroup.com](mailto:fjackson@legendgroup.com)

**VALIC (CONTINUED)**

**ROBERT FORTNER**  
[Robert.fortner@valic.com](mailto:Robert.fortner@valic.com)  
**RYAN VAN BUREN, CFP®**  
[Ryan.van.buren@valic.com](mailto:Ryan.van.buren@valic.com)

9434 N. US Highway 1  
Sebastian, FL 32958 (772) 293-9058  
**ING RETIREMENT PLANS (3)**  
**ANNUITY CORPORATION**  
**P.O. BOX 34148**  
**SEATTLE, WA 98124-1148**  
**877-884-5050**

**LOCAL REPRESENTATIVES\***

- **ORRETT GARTH**  
1717 SW ERIE ST  
PORT ST LUCIE, FL 34953  
(772) 240-9746
- **ANTHONY LOSH**  
2400 SE MONTEREY RD  
STUART, FL 34996  
(772) 426-8176
- **BRIAN THERRELL/ERIC FOLDEN/IAN HUMPHREY**  
301 YAMATO ROAD., STE 2150  
BOCA RATON, FL 33431  
561-443-5510/561-453-9396
- **GREG BRICK/SHERWIN SARGEANT**  
1052 WILLA SPRINGS DR  
WINTER SPRINGS, FL 32708  
407-678-4014
- **AL JOHNSON/MONIKER HUNT**  
2057 S US HIGHWAY 1  
FT. PIERCE, FL 34950  
(772) 323-8316
- **EDDIE SMIDTSROD**  
AAA FINANCIAL  
556 SW PRADO AVE  
PORT ST. LUCIE, FL 34983  
(772) 979-6515

Aspire Financial (2)  
9450 SW Genimi Dr.  
PMB 65198  
Beaverton, Oregon 97008-7105

Phone: 866-634-5873

Local Representatives:

Sal Stanzione  
772-529-0016  
[sal.stanzione@LPL.com](mailto:sal.stanzione@LPL.com)  
2440 SE Federal Hwy STE G Stuart FL 34994

Chris Padrick  
561-758-2517  
[Chris.padrick@lpl.com](mailto:Chris.padrick@lpl.com)  
2440 SE Federal Hwy STE G Stuart FL 34994

Aaron Skloff, AIF, CFA, MBA  
CEO - Skloff Financial Group  
CA Insurance License # 0G97797  
Phone: 908-464-3060  
Mobile: 908-531-6422  
[www.skloff.com](http://www.skloff.com)

**THE LEGEND GROUP, INC. (3)**  
**3920 RCA BLVD. SUITE 2004**  
**PALM BEACH GARDENS, FL 33410**  
**Fred Jackson**  
**(561) 472-7214**

- (1) Company provides 403(b) plans only
- (2) Company provides both 403(b) and 457 plans.
- (3) Company provides 457 plans only
- (4) Company not available to new or returning employees for 403(b). Open only to existing clients & SLCSB employees as of 8/31/08 for 403(b)s, and open for any employee for 457 plan.

**IMPORTANT NOTE:**

"Local Representatives" are listed solely to assist employees who wish to speak to a local contact person. The listing of a representative does NOT imply that the School Board endorses them in any way, does not imply that the representative is the only local agent of the tax-sheltered annuity provider, and does not imply that the employee must contact a local representative in order to open a tax-sheltered annuity account. The School Board does not endorse any provider or representative. The choice of a tax-sheltered annuity provider is entirely the responsibility of the employee.