

Liberty Elementary School District #25

403(b) & 457(b) Investment Providers

Approved Investment Provider	Name of Agent	Agent Contact Information
Ameriprise Financial	N/A	800.862.7919
Equitable Advisors LLC	Jacob Parent Securities Agent & Investment Advisor Scottsdale, AZ	714.299.2996 jacob.parent@equitable.com
Mass Mutual Ascend Life Ins. Co.	Jeff Wilhelms, MBA, CSLP®, CRES Investment Adviser Representative 5016 S. Ash Ave, Ste. 103 Tempe, AZ 85282 Website: www.lincolninvestment.com www.retirement-professionals.com	877.469.7377 jwilhelms@lincolninvestment.com Fax: 877.469.7377 Text: 480.999.9415
Horace Mann	Eric Fitzgerald	623.386.7570 eric.fitzgerald@horacemann.com
MetLife Resources	Tim Whitney, CLTC®, RICP® GoldBook Financial 4900 N. Scottsdale Rd, Suite 4000 Scottsdale, AZ 85251 Website: goldbookfinancial.com	602.569.9542 twhitney@goldbookfinancial.com
PlanMember Services	Gavin Jensen One2One Wealth Strategies	623.850.0016 gavin@121ws.com
Security Benefit Group	Jeff Wilhelms, MBA, CSLP®, CRES Investment Adviser Representative 5016 S. Ash Ave, Ste. 103 Tempe, AZ 85282 Website: www.lincolninvestment.com www.retirement-professionals.com	877.469.7377 jwilhelms@lincolninvestment.com Fax: 877.469.7377 Text: 480.999.9415
VALIC (AIG)	Robert Filmore	480.649.3995 Robert.Filmore@valic.com
VOYA (formerly ING)	John Bartimoccia LPL Financial Advisor SJI Financial Services PO Box 74264 Phoenix, AZ 85027	623.341.4923 jbartimoccia@sjf.us.com
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