

School Board of Polk County, Florida  
**PAYROLL DEDUCTION AUTHORIZED**  
**ANNUITY COMPANIES**

**AGENT OF RECORD LIST**

<u>COMPANY</u>	<u>AGENT OF RECORD</u>	<u>ADDRESS</u>	<u>CITY</u>	<u>STATE</u>	<u>ZIP</u>
ALLEN & COMPANY of FL	Michael Wright	1401 South Florida Avenue	Lakeland	FL	33803
AMERICAN CENTURY	Tim Gillin	4500 Main Street	Kansas City	MO	64141
AMERIPRISE FINANCIAL	Steven Petersen	1910 Lakeland Hills Blvd	Lakeland	FL	33805
AXA EQUITABLE LIFE	Steven Smitten	4890 W. Kennedy Blvd. STE. 800	Tampa	FL	33609
CPS Investment Advisors	Michael L. Lawton	1509 South Florida Avenue	Lakeland	FL	33803
GREAT AMERICAN FIN. RESOURCES	Rick A. Smith	16241 N. Florida Ave.	Lutz	FL	33549
HORACE MANN	Dean Suris	1180 Spring Centre S Blvd STE 212	Altamonte Spring	FL	32714
ING RETIREMENT PLANS	R.A. "Bob" Cavanaugh	3523 Royal Ct. S.	Lakeland	FL	33812
LIFE INSURANCE OF THE SW	Keith Young	1300 W. Mockingbird	Dallas	TX	75247
PLAN MEMBER SERVICES	Richard Rush	1052 Willa Springs Dr.	Winter Springs	FL	32708
VALIC	Vince Sorrentino	12001 Research Pkwy Suite 132	Orlando	FL	32826
WADDELL & REED	Debra Schmidt	4300 W. Cypress St. Suite 725	Tampa	FL	33607

<u>COMPANY</u>	<u>AGENT OF RECORD</u>	<u>LOCAL AGENT</u>	<u>LOCAL AGENT CONT'D</u>	<u>LOCAL AGENT CONT'D</u>	<u>LOCAL AGENT CONT'D</u>
<b>Allen &amp; Co.</b> 1401 S. Florida Ave Lakeland, FL 33803 Customer Service 863-688-9000	Michael Wright 863-616-6047  Fred Lopez 688-9000  Lyonal Lindsey 688-9000	Ron Riggs 688-9000  Troy Garcia 688-9000	Keith Albritton 688-9000  Karin Day McKnight 688-900	Laura Hawley 688-9000  R. Ferron Edwards 688-9000	Cynthia Marotz 688-9000  Diane Burr 294-7411
<b>American Century Investments</b>	Available: Monday through Friday from 7:00 a.m. to 5:30 p.m. Central Time				
<b>Ameriprise Financial</b> 50799 AMP Financial Center Minneapolis, MN 55474	Steven Petersen 863-688-6863	Susan Giroux 863-688-6863	Scott Charboneau 813-868-8744	Rudy Molnar 407-839-0433	
Local Office 1910 Lakeland Hills Blvd Lakeland, FL 33805 Business Retirement Specialists 800-345- 3533	Lois Alston 863-688-6863  Dorothy Adair 813-877-5713	Steven Taylor 863-688-6863  Karen Tiner 863-297-5666	Jeffery Wallace 863-688-6863  Brandon Ronca 407-839-0440		

<b>AXA Equitable</b> PO Box 13463 Newark, NJ 07188-0463	Steven Smitten 813-282-9088  Joshua Schenker 407-590-9393	Scott Angle 813-466-3150  Devin Roundtree 813-466-4129	Carlos Moisa 813-466-3144  Ryan Morais 813-494-5668	Chelsea Brown 813-466-3154  Gary Bernard 813-466-3132
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Customer Service 1-800-628-6673	Ryan Mundy 407-247-6505	Brenda Gold 813-466-4253	Haley Gaidosh 813-466-3142
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**CPS  
Investment  
Advisors**

1509 South Florida  
Avenue  
Lakeland, FL 33803  
863-688-1725  
LOCAL  
877-564-6277  
TOLL FREE  
863-899-4592  
CELL  
863-688-0692  
FAX  
[www.cpalliance.com](http://www.cpalliance.com)

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863-688-1725 EXT 116

<b>Great American Financial</b> PO Box 691094 Cincinnati, OH 45269	James Acevedo 863-835-1369  Robert B. Edison 800-926-9186	Dan Snow 407-529-6291  Timothy Ashenfelter 863-381-3562	Mike Dean 863-797-1225  Isaac Rosier 863-816-4630	Brad Dantzler 863-298-9569  Amelia Holder 813-732-9096
Customer Service 800-854-3649	Robert Cavanaugh 863-646-7389 <a href="mailto:tsabob@aol.com">tsabob@aol.com</a>	Sharon Lewis 813-287-8800		

<b>Horace Mann Life Insurance Co.</b> PO Box 3263 Springfield, IL 62708-9953 Customer Service 800-999-1030	Dean Surris 407-862-1266  Greg Mercer 863-967-7600	Dick Christian 863-533-5335  Greg Badgerow 863-701-7177	Leon Sturk 407-574-2255	Jacqualyne Ferrell 863-686-4040	
<b>ING Retirement Plans</b> 151 Farmington Ave Hartford, CT 06156 Customer Service 877-884-5050	Robert Cavanaugh 863-646-7389  David Baldwin 863-853-7879	Armando Blondin 954-389-9400  Ronald Pritchard 863-533-3565	Nevin Overmiller 727-432-8417  Samuel Rosenberger 863-619-2600	Debbie Schoonover 800-424-3185  Catherine Rideout 863-644-5319	Kelly Demo 800-330-4014
<b>Life Insurance Company of the SouthWest</b>  1300 W Mockingbird Lane Dallas, TX 75247 Customer Service 1-800-579-2878	Keith Young 800-906-3310  Stephen Bennett 813-949-6115 <a href="mailto:sbennett@valuteachers.com">sbennett@valuteachers.com</a>  Catherine Rideout 863-644-5319	Scott Wells 727-642-5241 <a href="mailto:swells403b@aol.com">swells403b@aol.com</a>  Melissa Banuchi 813-857-6667  Richard Williams 407-489-5557	Rene Aleman 407-416-3219  Chris Andreu 863-288-8004	Kelly Demmo 407-678-4014  Dave Bisel 863-528-1132	Amy Tielves 863-453-3599  Robert Clark 941-773-2174
<b>Plan Member Services</b>  Customer Service 1-800-874-6910	Richard Rush 800-874-6910 ext. 2332 Andrew Gammon 407-438-2012	Mike Berzovich 800-330-4014  Tracy Gillette 813-914-0440	Karen Watson 727-791-0577  Eric Tharp 407-721-3665	David Payne 407-678-4014 ext. 307	Kelly Demmo 407-489-3883 800-330-4014

**VALIC**  
P.O. Box 15648  
Amarillo, TX  
79105-5648

Vince Sorrentino  
800-892-5558 ext. 89748  
407-257-8309

Steven Riddle  
800-892-5558  
87309  
813-763-3730

Cheri Kent  
Ext. 800-892-5558  
Ext. 88579  
863-268-4192

Peter Patterson  
800-892-5558  
ext. 88892 or  
352-323-1352

Gregory Koenig  
863-224-1934  
800-892-5558  
Ext. 89806

Customer Service  
800-448-2542  
FAX  
1-877-202-0187

**Waddell & Reed** Debra Schmidt  
913-236-1517

Ken Carruba  
813-348-0097  
800-683-2135

Mike Milas  
813-348-0097  
800-683-2135

Todd Mazur  
727-785-3195  
800-881-3195

Wendy Thomas  
727-785-3195  
800-881-3195

To log in online  
at the Waddell &  
Reed Website :  
case # **937-80048**

Customer Service  
800-683-2135

**457 (b) DEFERRED COMPENSATION PLANS**

VALIC

Great American Financial Resources  
ING Retirement Plans  
Plan Member Services

AXA – Equitable Life Assurance

Horace Mann

Life Insurance Company of the SouthWest

**ROTH 403 (b) Plans**

VALIC

Great American Financial Resources  
Life Insurance Company of the SouthWest

AXA – Equitable Life Assurance

ING Retirement Plans

Plan Member Services