

Revised 11/02/09

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	Ralph Allen	1401 South Florida Avenue	Lakeland	FL	33803
AMERICAN CENTURY	Sue McCune	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
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	PO Box 1659	Highland City	FL	33846
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	6300 Lamar Avenue	Shawnee Mission	KS	66201

<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>
Allen & Co. 1401 S. Florida Ave Lakeland, FL 33803 Customer Service 863-688-9000	Michael Walker 800-950-2526	Ron Riggs 688-9000	Keith Albritton 688-9000	Laura Hawley 688-9000	Cynthia Marotz 688-9000
		Steven McTaggart 688-9000	Karin Day McKnight 688-900	R. Ferron Edwards 688-9000	Diane Burr 294-7411
		Fred Lopez 688-9000	Lyonal Lindsey 688-9000		
American Century Investments	Sue McCune 816-340-8106	Karen Burnett 816-340-4473			
Ameriprise Financial 50799 AMP Financial Center Minneapolis, MN 55474	Steven Petersen 863-688-6863	Jorge Blanco 813-868-8758	Karen Tiner 863-297-5666	Ronald Rimmer 863-688-6863	Steven Taylor 863-688-6863
		Susan Giroux 863-688-6863	Scott Charboneau 813-868-8744	Brandon Ronca 407-839-0440	Jarrold Rutledge 813-868-8721
Local Office 1910 Lakeland Hills Blvd Lakeland, FL 33805 FAX# 863-682-6134		Christopher Davidson 813-868-8758			

AXA Equitable
PO Box 13463
Newark, NJ 07188-0463
Customer Service
1-800-628-6673

Steven Smitten
813-282-9088

Scott Angle
813-282-9088

Carlos Moisa
813-282-9088

Benjamin Prescott
813-282-9088

Linette Bastides
813-282-9088

Great American Financial
PO Box 691094
Cincinnati, OH 45269

Customer Service
800-854-3649

Rick Smith
800-771-7732

Dan Snow
407-529-6291

Marsha Odor
813-263-7611

Brad Dantzler
863-298-9569

Paula Albertson
813-707-0892

Nathan Helms
813-876-4309

Antoine Scott
813-447-1095

Merle Hanneken
813-707-0892

Isaac Rosier
863-816-4630

Robert B. Edison
800-926-9186

Horace Mann Life Insurance Co.
PO Box 3263
Springfield, IL
62708-9953

Customer Service
800-999-1030

Dean Surrus
407-862-1266

Dick Christian
863-533-5335

Steve Wilson
863-678-0477

Jacqualyne Ferrell
863-686-4040

Greg Badgerow
863-701-7177

Greg Mercer
863-967-7600

**ING Retirement
Plans**
151 Farmington Ave
Hartford, CT 06156

Robert Cavanaugh
863-646-7389

Mike Berzovich
800-330-4014

Robert Pendle
800-330-4014

Debbie Schoonover
800-424-3185
863-655-4878

Customer Service
877-884-5050

Elizabeth Amill
407-678-4014

Ronald Pritchard
863-533-3565

Samuel Rosenberger
863-619-2600

Catherine Rideout
863-644-5319

**Life Insurance
Company of the
SouthWest**

Keith Young
800-906-3310

Scott Wells
888-854-5662

Nevin Overmiller
727-319-6310
727-432-8417

Cynthia Carson
863-944-0976

1300 W
Mockingbird Lane
Dallas, TX 75247

Melissa Banuchi
813-672-1586

Michael Wheeler
863-944-8711

Andrew Dennis
863-602-6494

Robert Clark
941-733-2174

Customer Service
1-800-579-2878

Robert Castaldi
863-559-8452

Catherine Rideout
863-644-5319

Aimee Tielves
863-453-3599

**Plan Member
Services**

Richard Rush
800-874-6910
ext. 2332

Mike Berzovich
800-330-4014

Karen Watson
727-791-0577

David Payne
407-678-4014
ext. 307

Kelly Demmo
407-489-3883
800-330-4014

Customer Service
1-800-874-6910

Tracy Gillette
813-914-0440

Eric Tharp
407-721-3665

VALIC
P.O. Box 15648
Amarillo, TX
79105-5648
Customer Service
800-448-2542
FAX
1-877-202-0187

Vince Sorrentino
800-369-0314
407-257-8309

Paul Beavin
800-892-5558
Ext. 88528

Cheri Kent
800-892-5558
Ext. 85579

James Saurino
800-892-5558
Ext. 89213

Scott Mitchell
813-610-8964

Ken Ward
800-892-5558
Ext. 87036
or 863-398-3422

Gregory Koenig
800-892-5558
Ext. 89806

Waddell & Reed

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

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

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