

TAHOMA SCHOOL DISTRICT # 409

Participating 403(b) Investment Providers

The following investment providers are available for remittance of salary reduction contributions and transfers under the 403(b) Plan:

INVESTMENT PROVIDERS	INVESTMENT PROVIDER CONTACTS
AMERIPRISE FINANCIAL SERVICES	AGP WEALTH ADVISORS ALAN BLINN, CFP Phone# 425-228-1000 ALAN.D.BLINN@AMPF.COM 126 WELLS AVE S. RENTON, WA 98057
ASPIRE FINANCIAL SERVICES	ASPIRE FINANCIAL SERVICES ASPIRE FINANCIAL SERVICES Phone# 866-634-5873 4010 BOY SCOUT BLVD, STE. 500 TAMPA, FL 33607
	EDWARD JONES AMANDA GROSS Phone# 425-413-0882 AMANDA.GROSS@EDWARDJONES.COM 22125 SE 237TH ST, SUITE 104 MAPLE VALLEY, WA 98038
	EDWARD JONES BRODY A KUNZ Phone# 253-630-0177 BRODY.KUNZ@EDWARDJONES.COM 27331 172ND AVE. SE, STE.106 COVINGTON, WA 98042
	EDWARD JONES DENNY PIERRE Phone# 425-432-2516 DENNY.PIERRE@EDWARDJONES.COM 26908 MAPLE VALLEY HWY, STE.B MAPLE VALLEY, WA 98038

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INVESTMENT PROVIDERS	INVESTMENT PROVIDER CONTACTS
ASPIRE FINANCIAL SERVICES	EDWARD JONES JON H ROELOFS Phone# 425-413-5156 JON.H.ROELOFS@EDWARDJONES.COM 27203 216TH AVE. SE., STE.2 MAPLE VALLEY, WA 98038
	EDWARD JONES CAROLINE WHITLOCK Phone# 425-413-0882 CAROLINE.WHITLOCK@EDWARDJONES.COM 22125 SE 237th St. SUITE 104 MAPLE VALLEY, WA 98038
AXA EQUITABLE LIFE INSURANCE	AXA EQUITABLE LIFE INS. CO. AXA EQUITABLE LIFE INS. CO. Phone# 800-628-6673 WWW.AXA.COM/TEACHER P.O. BOX 4956 SYRACUSE, NY 13221
FIDUCIARY TRUST CO. OF NEW HAMPSHIRE	FIDUCIARY TRUST CO. OF NEW HAMPSHIRE TIM GOERING Phone# 360-734-4728 4164 MERIDIAN, STE.104 BELLINGHAM, WA 98226
	FIDUCIARY TRUST CO. OF NEW HAMPSHIRE LISA ROHRBAUGH Phone# 509-925-1885 707 N. PEARL ST., STE. C ELLENBURG, WA 98926
	FIDUCIARY TRUST CO. OF NEW HAMPSHIRE DIANE SKILKETT Phone# 253-927-3808 181 S. 333RD ST., STE.125 FEDERAL WAY, WA 98003

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INVESTMENT PROVIDERS	INVESTMENT PROVIDER CONTACTS
FORESTERS FINANCIAL	(FORMERLY FIRST INVESTORS CORPORATION) FORESTERS FINANCIAL Phone# 800-832-7783 FILCUST@FORESTERS.COM 110 WALL STREET NEW YORK, NY 10005-3830
GLOBAL ATLANTIC FINANCIAL GROUP	SHELGREN FINANCIAL GROUP STEVE SHELGREN Phone# 800-367-4388 SSHELGREN@LINCOLNINVESTMENT.COM 3900 E. VALLEY RD, STE.202 RENTON, WA 98057
INVESCO OPPENHEIMER FUNDS	INVESCO OPPENHEIMER FUNDS INVESCO OPPENHEIMER FUNDS Phone# 800-835-7305 P.O. BOX 5270 DENVER, CO 80217
JEFFERSON NATIONAL LIFE	JEFFERSON NATIONAL LIFE JEFFERSON NATIONAL LIFE Phone# 866-667-0564 435 HUDSON ST. NEW YORK, NY 10014
LINCOLN INVESTMENT PLANNING	SHELGREN FINANCIAL GROUP JOSE GUECO Phone# 253-863-2780 JGUECO@LINCOLNINVESTMENT.COM 5350 ORCHARD ST. WEST, STE. 200 UNIVERSITY PLACE, WA 98467
	SHELGREN FINANCIAL GROUP ERIC MANZANAREZ Phone# 425-251-5910 X145 EMANZANAREZ@LINCOLNINVESTMENT.COM 3900 E. VALLEY RD, STE. 202 RENTON, WA 98057

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LINCOLN INVESTMENT PLANNING	SHELGREN FINANCIAL GROUP STEVE SHELGREN Phone# 800-367-4388 SSHELGREN@LINCOLNINVESTMENT.COM 3900 E. VALLEY RD, STE.202 RENTON, WA 98057
NEW YORK LIFE	NEW YORK LIFE INS. CO. ALAN MCGAW Phone# 253-597-7133 AMCGAW@FT.NEWYORKLIFE.COM 1102 BROADWAY PLAZA, STE.200 TACOMA, WA 98402-3526
PRIMERICA SHAREHOLDER SERVICE	PRIMERICA SHAREHOLDER SERVICES PFS INVESTMENTS, INC Phone# 800-544-5445 3120 BRECKINRIDGE BLVD DULUTH, GA 30099-0001
RELIASTAR / ING	RELIASTAR LIFE INS. CO. RELIASTAR LIFE INS. CO. Phone# 877-884-5050 P.O. BOX 990065, MS-A3S WINDSOR, CT 061990065
	VOYA FINANCIAL ADVISORS JASON RICHERT Phone# 425-429-3024 JASON.RICHERT@VOYAF.A.COM 10655 NE 4TH STREET, SUITE 300 BELLEVUE, WA 98004
SECURITY BENEFIT	SECURITY BENEFIT JUSTIN R HARRIS Phone# 206-324-0891 JUSTINHARRIS@SOCIALYRESPONSIBLEINVESTING.O 4464 FREMONT AVE. N., STE.310 SEATTLE, WA 98103

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INVESTMENT PROVIDERS	INVESTMENT PROVIDER CONTACTS
VALIC	VALIC RICK SCHIED Phone# 800-523-5332 RICK.SCHIED@VALIC.COM 2825 EASTLAKE AVE., STE.220 SEATTLE, WA 98102