

403(b) and 457(b) Local Advisor List Amphitheater Public Schools

Company	403(b)	457(b)	Advisor	Email	Phone #
AIG Retirement Services (formerly Valic)	√		Anthony Puccio	Anthony.puccio@aig.com	520-282-3912
Ameriprise Financial	√		Rebecca Johnson	rebecca.l.johnson@ampf.com	520-327-3299
AXA Equitable Life Insurance Company	√	√	Jon Rankin	Jonathan.Rankin@axa-advisors.com	520-512-5958
			Andres Escobedo	Andres.Escobedo@axa-advisors.com	520-512-5941
			Roy Morris	Roy.morris@axa-advisors.com	520-512-5950
Fidelity	√	√	Customer Service Center	https://www.fidelity.com/	800-835-5095
Great American-Annuity Investors Life	√		Adam Pearce	Adam@retirement-professionals.com	877-469-7377
GWN Securities	√	√	Todd Sepp	toddsepp@retirementplanprofessionals.com	520-240-8973
Horace Mann Insurance Company	√		Jennifer Kruse	Jennifer.kruse2@horacemann.com	855-931-4187
(Invesco) Oppenheimer Funds	√		Customer Service Center	https://www.invesco.com/portal/site/us/gateway	800-959-4246
Lincoln National Life Insurance Company	√		Customer Service Center	https://www.lfg.com/public/individual	800-454-6265
Metropolitan Life Insurance Company	√		William Babicke	wbabicke@financialguide.com	520-490-4732
			Stewart Kanzler	skanzler@financialguide.com	520-818-8410
Reliastar Life – Subsidiary of VOYA Financial	√		Nancy Bakshi	nancy.bakshi@voyafa.com	(520) 639-2677
Security Benefit Group	√	√	Todd Sepp	toddsepp@retirementplanprofessionals.com	520-240-8973
The Legend Group – A Lincoln Investment Company	√	√	Andre R. Solis	asolis@lincolninvestment.com	520-907-3350
Vanguard	√	√	Customer Service Center	https://investor.vanguard.com/investing/	877-662-7447
VOYA Financial	√	√	Nick Depner	Nick.Depner@voyafa.com	480-864-9839
	√	√	Dawn Depner	Dawn.Depner@voyafa.com	480-864-9864

