

# School Board of Polk County

## Authorized TSA Companies and Agents

### Allen & Company of FL

Michael Wright (Agent of Record)	863-616-6047	<a href="mailto:mwright@alleninvestments.com">mwright@alleninvestments.com</a>
Keith Albritton	863-616-6037	<a href="mailto:kalbritton@alleninvestments.com">kalbritton@alleninvestments.com</a>
Laura Hawley	863-616-6028	<a href="mailto:lhawley@alleninvestments.com">lhawley@alleninvestments.com</a>
Cynthia Marotz	863-616-6022	<a href="mailto:cmarotz@alleninvestments.com">cmarotz@alleninvestments.com</a>
Troy Garcia	863-616-6351	<a href="mailto:tgarcia@alleninvestments.com">tgarcia@alleninvestments.com</a>
Dana Hurley	863-616-6344	<a href="mailto:dhurley@alleninvestments.com">dhurley@alleninvestments.com</a>
Diane Burr	863-401-2027	<a href="mailto:dburr@alleninvestments.com">dburr@alleninvestments.com</a>
Fred Lopez	863-616-6056	<a href="mailto:flopez@alleninvestments.com">flopez@alleninvestments.com</a>
Brad Stainsby	863-616-6342	<a href="mailto:bstainsby@alleninvestments.com">bstainsby@alleninvestments.com</a>
Chad Jones	863-616-6054	<a href="mailto:cjones@alleninvestments.com">cjones@alleninvestments.com</a>
Souri Vongvirat	863-616-6051	<a href="mailto:svongvirat@alleninvestments.com">svongvirat@alleninvestments.com</a>
Isaac Hartman	863-616-6039	<a href="mailto:ihartman@alleninvestments.com">ihartman@alleninvestments.com</a>
Keith Henderson (Holland)	863-616-6041	<a href="mailto:hhenderson@alleninvestments.com">hhenderson@alleninvestments.com</a>
Bob Sullivan	863-626-9521	<a href="mailto:bsullivan@alleninvestments.com">bsullivan@alleninvestments.com</a>
Eric Greenhow	863-401-2027	<a href="mailto:egreenhow@alleninvestments.com">egreenhow@alleninvestments.com</a>
Blake Steedley	863-401-2024	<a href="mailto:bsteedley@alleninvestments.com">bsteedley@alleninvestments.com</a>

### American Century Investments

Bill Filer	800-345-3533	<a href="mailto:Bill_filer@americancentury.com">Bill_filer@americancentury.com</a>
------------	--------------	--

### Ameriprise Financial

Steven Petersen (Agent of Record)	863-688-6863	<a href="mailto:steven.l.petersen@ampf.com">steven.l.petersen@ampf.com</a>
Ronald Rimmer	863-688-6863	<a href="mailto:ronald.l.rimmer@ampf.com">ronald.l.rimmer@ampf.com</a>
Susan Giroux	863-688-6863	<a href="mailto:susan.m.giroux@ampf.com">susan.m.giroux@ampf.com</a>
Steven Taylor	863-688-6863	<a href="mailto:steven.f.taylor@ampf.com">steven.f.taylor@ampf.com</a>
Jeffrey Wallace	863-688-6863	<a href="mailto:jeffery.2.wallace@ampf.com">jeffery.2.wallace@ampf.com</a>
Karen Tiner	863-438-7943	<a href="mailto:karen.t.tiner@ampf.com">karen.t.tiner@ampf.com</a>
Kevin Mc Williams	863-688-6863	<a href="mailto:Kevin.mcwilliams@ampf.com">Kevin.mcwilliams@ampf.com</a>

### AXA Equitable

Chelsea Hoagland	813-466-3144	<a href="mailto:chelsea.brown@axa-advisors.com">chelsea.brown@axa-advisors.com</a>
David Vente (Agent of Record)	813-232-9088	<a href="mailto:david.vente@axa-advisors.com">david.vente@axa-advisors.com</a>
Matthew Cassity	727-455-3078	<a href="mailto:matthew.Cassity@axa-advisors.com">matthew.Cassity@axa-advisors.com</a>
Alberto (AJ) Volpi	813-373-9134	<a href="mailto:alberto.volpi@axa-advisors.com">alberto.volpi@axa-advisors.com</a>
Lisa Robinson	408-234-5032	<a href="mailto:lisa.Robinson@axa-advisors.com">lisa.Robinson@axa-advisors.com</a>
Andrew Pontieri	631-626-9630	<a href="mailto:andrew.pontieri@axa-advisors.com">andrew.pontieri@axa-advisors.com</a>
Nicholas DiMestico	508-208-4081	<a href="mailto:nicholas.dimestico@axa-advisors.com">nicholas.dimestico@axa-advisors.com</a>
Cody Kippenberger	727-366-3396	<a href="mailto:cody.kippenberger@axa-advisors.com">cody.kippenberger@axa-advisors.com</a>

### CPS Investment Advisors

Nolen Bailey (Agent of Record)	863-688-1725 ext. 138	<a href="mailto:Nolen@CPSinvest.com">Nolen@CPSinvest.com</a>
--------------------------------	-----------------------	--

Jim Luffman	863-688-1725 ext. 103	<a href="mailto:Jim@CPSinvest.com">Jim@CPSinvest.com</a>
Michael Riskin	863-688-1725 ext. 116	<a href="mailto:MRiskin@CPSinvest.com">MRiskin@CPSinvest.com</a>
Peter Golotko	863-688-1725 ext. 115	<a href="mailto:Peter@CPSinvest.com">Peter@CPSinvest.com</a>
<b>Great American Insurance</b>		
Steve Neperud (Agent of Record)	800-438-3398	<a href="mailto:sneperud@gaig.com">sneperud@gaig.com</a>
Gianna Campo	941-323-2124	<a href="mailto:gcampo@appreciationfinancial.com">gcampo@appreciationfinancial.com</a>
Tony Clark	941-212-5858	<a href="mailto:tony@tclarkandassociates.com">tony@tclarkandassociates.com</a>
Robert A Cavanaugh	863-318-0931	<a href="mailto:tsabob@aol.com">tsabob@aol.com</a>
Jorge Valido	786-317-4007	<a href="mailto:j.valido@dragon-financial.com">j.valido@dragon-financial.com</a>
Michael Competelli	813-957-2167	<a href="mailto:mcompetelli@gmail.com">mcompetelli@gmail.com</a>
Scott Wells	727-642-5241	<a href="mailto:swells403b@aol.com">swells403b@aol.com</a>
Frank Rossetti	352-293-2972	<a href="mailto:frossetti@fdrfinancial.com">frossetti@fdrfinancial.com</a>
Brett Zernick	813-770-4570	<a href="mailto:bzernick@appreciationfinancial.com">bzernick@appreciationfinancial.com</a>
Misty Hicks	863-602-8530	<a href="mailto:mistyhicks@appreciationfinancial.com">mistyhicks@appreciationfinancial.com</a>
Glenn Reeder	863-602-0800	<a href="mailto:GReeder@appreciationfinancial.com">GReeder@appreciationfinancial.com</a>
<b>Horace Mann</b>		
Dean Suris (Agent of Record)	407-625-0784	<a href="mailto:Dean.suris@horacemann.com">Dean.suris@horacemann.com</a>
Joe Fisher	863-686-4040	<a href="mailto:Joe.fisher@horacemann.com">Joe.fisher@horacemann.com</a>
Leon Sturk	407-846-1570	<a href="mailto:Leon.sturk@horacemann.com">Leon.sturk@horacemann.com</a>
Chad Langford	863-644-7300	<a href="mailto:Chad.langford@horacemann.com">Chad.langford@horacemann.com</a>
Harley "Chuck" Langford Jr.	863-644-7300	<a href="mailto:Chuck.langford@horacemann.com">Chuck.langford@horacemann.com</a>
Melissa West	863-439-5555	<a href="mailto:Melissa.west@horacemann.com">Melissa.west@horacemann.com</a>
Chris Colon	863-686-4040	<a href="mailto:Chris.colon@horacemann.com">Chris.colon@horacemann.com</a>
Mike Smith	863-686-4040	<a href="mailto:Michael.smith@horacemann.com">Michael.smith@horacemann.com</a>
Jonathan Shuttera	863-439-5555	<a href="mailto:Jonathan.shuttera@horacemann.com">Jonathan.shuttera@horacemann.com</a>
Curt Matson	863-686-4040	<a href="mailto:Curtis.matson@horacemann.com">Curtis.matson@horacemann.com</a>
<b>ING Retirement Plans</b>		
Robert "Bob" Cavanaugh (Agent of Record)	863-318-0931	<a href="mailto:tsabob@aol.com">tsabob@aol.com</a>
Armando Blondin	954-389-9400	<a href="mailto:Armando.blondin@voyafa.com">Armando.blondin@voyafa.com</a>
Samuel Rosenberger	863-619-2600	<a href="mailto:rightcombination@verizon.net">rightcombination@verizon.net</a>
Catherine Rideout	863-644-5319	<a href="mailto:crideout@catherinerideout.com">crideout@catherinerideout.com</a>
Kelly Demo	800-330-4014	<a href="mailto:KDemmo@PlanMemberSec.com">KDemmo@PlanMemberSec.com</a>
Debbie Schoonover	800-424-3185	
Wes Whitten	813695-7644	<a href="mailto:wwhitten@appreciationfinancial.com">wwhitten@appreciationfinancial.com</a>
<b>National Life Insurance Group (LSW)</b>		
Jacob Marley (Agent of Record)	800-906-3310 Ext 9016	<a href="mailto:JMarley@nationallife.com">JMarley@nationallife.com</a>
Melissa Banuchi	813-857-6667	<a href="mailto:mbanuchi@valuteachers.com">mbanuchi@valuteachers.com</a>
Jean-Claude D'haiti	407-590-4877	<a href="mailto:eunicejean@yahoo.com">eunicejean@yahoo.com</a>
Kathryn Cochran	352-406-6570	<a href="mailto:kcochran@valuteachers.com">kcochran@valuteachers.com</a>
Michael Competelli	813-957-2167	<a href="mailto:mcompetelli@gmail.com">mcompetelli@gmail.com</a>
Gary Wayne Tetreault	386-478-9106	<a href="mailto:Tetreault12@yahoo.com">Tetreault12@yahoo.com</a>
Jorge Valido	786-317-4007	<a href="mailto:validorvp@gmail.com">validorvp@gmail.com</a>
O'Dane Johnson	954-856-9991	<a href="mailto:odane@voyageretirement.com">odane@voyageretirement.com</a>
Gail Dixon	513-258-6409	<a href="mailto:Gdixon@valuteachers.com">Gdixon@valuteachers.com</a>

Marcella Hernandez	262-510-6834	<a href="mailto:marcyh627@gmail.com">marcyh627@gmail.com</a>
Eric Owens	407-353-5690	<a href="mailto:e.owens@dragon-financial.com">e.owens@dragon-financial.com</a>
Sonya Gribble	863-797-0110	<a href="mailto:sonyagribble@valuteachers.com">sonyagribble@valuteachers.com</a>
Falynn Sisk	352-552-5559	<a href="mailto:falynnsisk7@gmail.com">falynnsisk7@gmail.com</a>
Ruth Perdomo	813-317-8187	<a href="mailto:lizabethmorales@yahoo.com">lizabethmorales@yahoo.com</a>
<b>Plan Member Services</b>		
Richard Rush (Agent of Record)	800-874-6910 ext. 2332	<a href="mailto:rrush@planmembersec.com">rrush@planmembersec.com</a>
Mike Berzovich	800-330-4014	<a href="mailto:michaelberz@rpaeducator.com">michaelberz@rpaeducator.com</a>
David Payne	407-678-4014 ext. 307	<a href="mailto:david@rpaeducator.com">david@rpaeducator.com</a>
Kelly Demmo	407-489-3883 & 800-330-4014	<a href="mailto:kdemmo@planmembersec.com">kdemmo@planmembersec.com</a>
Tracy Gillette	813-914-0440	<a href="mailto:tracy@tracygillette.com">tracy@tracygillette.com</a>
Eric Tharp	407-721-3665	<a href="mailto:etharp@planmembersec.com">etharp@planmembersec.com</a>
David Ellis	813-924-8894	<a href="mailto:David_ellis@planmembersec.com">David_ellis@planmembersec.com</a>
<b>VALIC</b>		
Gregg Hudak (Agent of Record)	941-480-1280	<a href="mailto:Gregg.hudak@valic.com">Gregg.hudak@valic.com</a>
Vince Sorrentino	407-482-8831	<a href="mailto:Vince.sorrentino@valic.com">Vince.sorrentino@valic.com</a>
Ryan Dewitt	941-705-0259	<a href="mailto:Ryan.dewitt@valic.com">Ryan.dewitt@valic.com</a>
David Dewitt	941-480-1280	<a href="mailto:David.dewitt@valic.com">David.dewitt@valic.com</a>
Benjamin Holtsinger	904-334-5452	<a href="mailto:Benjamin.holtsinger@valic.com">Benjamin.holtsinger@valic.com</a>
Craig Eden	863-370-2004	<a href="mailto:Craig.eden@valic.com">Craig.eden@valic.com</a>
Karen Forrest	863-223-6622	<a href="mailto:Karen.forrest@valic.com">Karen.forrest@valic.com</a>
<b>Waddell &amp; Reed</b>		
Andy Mohn	913-236-1660	<a href="mailto:Amohn1@waddell.com">Amohn1@waddell.com</a>
Ken Carruba	813-286-9196	<a href="mailto:kcarruba@wradvisors.com">kcarruba@wradvisors.com</a>
Todd Mazur	813-286-9196 ext. 126	<a href="mailto:tmazur@wradvisors.com">tmazur@wradvisors.com</a>
<b>SECURITY BENEFIT</b>		
Kaydi Dickerson (contact agent)	307-258-1629	<a href="mailto:Kaydi.dickerson@securitybenefit.com">Kaydi.dickerson@securitybenefit.com</a>
David Caporali	813-240-9309	<a href="mailto:david.caporali@abmmfinancial.com">david.caporali@abmmfinancial.com</a>
Steven Smitten	1-813-373-8883	<a href="mailto:Steven.smitten@abmmfinancial.com">Steven.smitten@abmmfinancial.com</a>
Nina Feliciano	1-786-352-5565	<a href="mailto:Nina.feliciano@abmmfinancial.com">Nina.feliciano@abmmfinancial.com</a>
Austin Eddy	407-931-6341	<a href="mailto:Austin@voyageretirement.com">Austin@voyageretirement.com</a>
Michael (Mike) Cook	727-578-2828 ext. 125	<a href="mailto:michaelcook@legendequities.com">michaelcook@legendequities.com</a>
Allen Thomas	863-207-0883	<a href="mailto:Athomas@Claraphi.com">Athomas@Claraphi.com</a>
Angela Miller	813-269-7100	<a href="mailto:amiller@westcoastfinancial.com">amiller@westcoastfinancial.com</a>
Michelle Engle	813-438-0900	<a href="mailto:michelleengle@legendequities.com">michelleengle@legendequities.com</a>