

## CHIPPEWA VALLEY SCHOOLS PARTICIPATING ANNUITY COMPANIES

Although we have provided contact information for local reps that can assist in setting up an account, employees may work with any financial rep of their choosing to set up an account with one of these vendors.

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### **American Funds**

403b Approved Vendor

Scott Nehra, Morgan Stanley

220 Park Street, Suite 220

Birmingham, MI 48009

(248) 258-1794

[Scott.Nehra@morganstanley.com](mailto:Scott.Nehra@morganstanley.com)

Mary Tocco, Independent Financial Planners

16950 19 Mile Road

Clinton Twp, MI 48038

(586) 226-2977

[mtocco@sigmarep.com](mailto:mtocco@sigmarep.com)

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### **Ameriprise Financial**

403b Approved Vendor

Michael Coffield, CFP, CLU, ChFC, CRPC

900 Wilshire Drive, Suite 255

Troy, MI 48084

(248) 655-5041 OR (800) 244-9160

[Michael.P.Coffield@ampf.com](mailto:Michael.P.Coffield@ampf.com)

[www.michaelcoffield.com](http://www.michaelcoffield.com)

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### **Consolidated Financial Corporation**

403b and Roth 403b Approved Vendor

Timothy Narva

29905 Middlebelt Rd.

Farmington Hills, MI 48334

(248) 351-6000 OR (800) 232-2383

[www.consolidated-financial.com](http://www.consolidated-financial.com)

Advisory services and securities offered through Lincoln Investment Planning, Inc.

Registered Investment Advisor – Broker/Dealer – Member FINRA/SIPC

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### **Corebridge Financial (Formerly AIG / VALIC)**

403b, 457, and Roth 403b Approved Vendor

Michael DeTone, CFP: (248) 309-1508

2601 Cambridge Court, Suite 150

Auburn Hills, MI 48326

(800) 448-2542

Fax: (248) 327-0817

[Michael.Detone@corebridgefinancial.com](mailto:Michael.Detone@corebridgefinancial.com)

[www.corebridgefinancial.com](http://www.corebridgefinancial.com)

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**Equitable (Formerly AXA)**

403b, 457, and Roth 403b Approved Vendor

Thomas C. Allam

49206 Van Dyke Ave.

Shelby Twp, MI 48317

(586) 884-6068

Fax: (586) 884-6452

[Thomas.allam@axa-advisors.com](mailto:Thomas.allam@axa-advisors.com)

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**Fidelity Management Trust**

403b, 457, and Roth 403b Approved Vendor

403b Plan # 54320

457 Plan # 68261

P.O. Box 31401

Salt Lake City, UT 84131

(800) 343-0860

You must contact Fidelity to properly enroll with them. After you have completed Fidelity's paperwork and receive an account confirmation, you must complete a Salary Reduction Agreement (SRA) form to begin payroll contributions.

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**Horace Mann Insurance Company**

403b and Roth 403b Approved Vendor

Thomas Hoag

46771 Riverwoods

Macomb, MI 48044

(586) 263-1884

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**MEA Financial Services (Paradigm)**

403b, 457, and Roth 403b Approved Vendor

Scott Barnhart

1480 Kendale Blvd., PO Box 2501

East Lansing, MI 48826-2501

(586) 907-8203

[sbarnhart@mea.org](mailto:sbarnhart@mea.org)

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**T. Rowe Price Trust Company**

403b Approved Vendor

Plan # 000105235

Retirement Operations Group

PO Box 17479

Baltimore, MD 21298

(800) 492-7670

You must contact T. Rowe Price to properly enroll with them. After you have completed T. Rowe Price's paperwork and receive an account confirmation, you must complete a Salary Reduction Agreement (SRA) form to begin payroll contributions.

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**The Vanguard Group**

403b Approved Vendor

Plan # RFEVY

Attn: DC

PO Box 982902

El Paso, TX 79998-2902

(800) 523-1188

[Retirement plan log in | Vanguard](#)

You must contact Vanguard to properly enroll with them. After you have completed Vanguard's paperwork and receive an account confirmation, you must complete a Salary Reduction Agreement (SRA) form to begin payroll contributions.