

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.

American Funds

403b Approved Vendor

Scott Nehra, Morgan Stanley
220 Park Street, Suite 220
Birmingham, MI 48009
(248) 258-1794
Scott.Nehra@morganstanley.com

Mary Tocco, Independent Financial Planners
16950 19 Mile Road
Clinton Twp, MI 48038
(586) 226-2977
mtocco@sigmarep.com

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
www.michaelcoffield.com

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

Advisory services and securities offered through Lincoln Investment Planning, Inc.
Registered Investment Advisor – Broker/Dealer – Member FINRA/SIPC

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
www.corebridgefinancial.com

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

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.

Horace Mann Insurance Company

403b and Roth 403b Approved Vendor

Thomas Hoag
46771 Riverwoods
Macomb, MI 48044
(586) 263-1884

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

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.

The Vanguard Group

403b Approved Vendor

Plan # RFEVY

Small Business Services

PO Box 1106

Valley Forge, PA 19482-1106

(800) 662-7447

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.