

University of North Texas/University of North Texas System
OPTIONAL RETIREMENT PROGRAM AND TAX DEFERRED ACCOUNTS (ORP/TDA)
AUTHORIZED CARRIERS LIST

COMPANY PRESIDENT/ GENERAL COUNSEL	AGENTS (CONTACT PERSON)	CARRIER INTERNET ADDRESS	PROGRAMS
<p>AMERICAN FUNDS Kimberly Leone- ORP Coordinator 333 South Hope Street Los Angeles, CA 90071</p> <p>CS# 800.421.0180 khl@capgroup.com</p>	<p>James A. Rench, CFP 2438 Lillian Miller Pkwy. Ste. 200 Denton, TX 76205 940.387.7526 Fax: 940.484.9079 Email: jrench@ramfa.com</p> <p>Carl H. Stocker, CFS 2412 Old North Rd. Bldg. #103 Denton, TX 76209 940.566.1212 Fax: 940.381.3074 Email carl@stockerwoods.com</p>	<p>www.americanfunds.com</p> <p>www.stockerwoods.com</p>	<p>Mutual Funds</p>
<p>AIG VALIC FINANCIAL ADVISORS Les Rosenblatt- District Manager 14643 Dallas Pkwy, #775 Dallas, TX. 75254 972.383.7212</p> <p>CS# 800.428.2542</p>	<p>Brian Freundt 972.383.7200 Fax: 972.490.1773 Cell Phone: 214.223.6343 Email: brian_fruendt@aigvalic.com</p> <p>Mark Heck 972.977.1030 (c) Fax: 972.490.1773 Email: mark_heck@aigvalic.com 14643 Dallas Parkway, Ste. 775 Dallas, TX. 75254</p>	<p>www.aigvalic.com</p>	<p>Fixed and Variable Annuities</p>
<p>CHASE INSURANCE COMPANY Scott Dumbauld, Sr. VP Chase Insurance Company 2500 Westfield Drive Elgin, Illinois 30123 847.930.7000</p> <p>CS# 800.621.5001</p>	<p>Damian J. Caruso PO Box 251606 Plano, TX. 75025 972.359.1827 Fax: 972.359.1828 Email: damian.caruso@comcast.net</p>	<p>www.chaseinsurancecompany.com</p>	<p>Fixed and Variable Annuities</p>

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CITISTREET Mark Skinner-President PO Box 6723 Somerset, NJ 08875-6723 CS# 800.521.7503	David Piccolo 940.367.4014 Fax: 940.243.1644 Email: dpiccolo@metlife.com Michael Carrizales, FSR 2805 North Dallas Pkwy Ste 215 Plano, TX 75093 800.236.8489 Email: mcarrizales@metlife.com MetLife Resources 2745 N. Dallas Parkway, Ste 130 Plano, TX. 75093	www.travelersla.com	Fixed and Variable Annuities
FIDELITY INVESTMENTS Jason Rasmussen-Regional VP One Destiny Way WA1F Westlake, TX. 76262 CS# 800.868.1023, 800.343.0860	Miguel Salazar 201 South Main St, UT3A Salt Lake City, UT, 84111 Fax: 972.910.5116 Email: miguel.salazar@fmr.com Office is Located in Westlake, TX	www.fidelity.com www.mysavingsatwork.com/atwork.com	Mutual Funds
FRANKLIN/TEMPLETON Dan Almuti - VP 100 Fountain Pkwy. St. Petersburg, FL 33716 800.462.1264, ext 28221 CS# 800.524.4040	Abe Nayfa 607 Sunset Street Denton, TX 76201-2665 940.565.0100 abe.nayfa@edwardjones.com Michael D. Woods, CFS Mutual Service Corporation 2412 Old North Rd. #103 Denton, TX 76209 940.566.1212 Fax: 940.381.3074 Email: mike@stockerwoods.com	www.franklin-templeton.com www.stockerwoods.com	Mutual Funds

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<p>ING Troy Dryer 8911 Capital of Texas HWY Suite 1300 Austin, TX 78613 800.873.5518</p> <p>CS# 800.525.4225</p>	<p>G. Thomas Swenson 2220 San Jacinto Blvd., Ste. 315 Denton, TX 76205 940.387.2211, 800.925.3505 Fax: 940.382.3683 Email: GThomas.Swenson@INGFA.com</p> <p>Brenda Forcht 15455 Dallas Pkwy, Ste 1250 Addison, TX 75001 972.643.6337, 800.714.3931 ext 4006337 brenda.forcht@ingfa.com</p>	<p>www.orptx.com</p> <p>www.ingretirementplans.com/index.shtml</p>	<p>Fixed and Variable Annuities</p>
<p>LINCOLN NATIONAL LIFE Rachel Knapp Southeast Relationship Manager 3436 Long Prairie, Ste. 108-184 Flower Mound, TX 75022 866.266.7972 phone 260.455.0196 fax Rachel.knapp@lfg.com</p> <p>CS# 800.454.6265</p>	<p>Glenn Ferrell, CFP 14911 Quorum Ste. 300 Dallas, TX 75240-7534 972.361.3895, 800.999.2559 Fax: 972.960.6847 Email: glenn.ferrell@lfg.com</p>	<p>www.LFG.com</p>	<p>Fixed and Variable Annuities</p>
<p>METLIFE RESOURCES James J. Hughes 1331 17th St. P.O. Box 1019 Denver, CO 80201</p> <p>CS# 800.962.8320</p>	<p>David Piccolo 940.367.4014 Fax: 940.243.1644 Email: dpiccolo@metlife.com</p> <p>Michael Carrizales 2805 North Dallas Pkwy Ste 215 Plano, TX 75093 800.236.8489 Email: mcarrizales@metlife.com</p> <p>MeltLife Resources 2745 N. Dallas Parkway, Suite 130 Plano, TX. 75093</p>	<p>www.metlife.com</p>	<p>Fixed and Variable Annuities</p>

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<p>NATIONWIDE LIFE INS. CO. Douglas N. Riggle Pension Consultant P.O. Box 16738 Columbus, OH 43216 CS# 800.547.7548</p>	<p>Carl Stocker, CFS 2412 Old North Rd. #103 Denton, TX 76209 940.566.1212 Fax: 940.381.3074 carl@stockerwoods.com</p> <p>Robert Alberts, CFS Mutual Service Corporation 2412 Old North Rd. #103 Denton, TX 76209 940.382.1100 Fax:940.381.3074 ralberts@mscmail.biz</p>	<p>www.bestofamerica.com www.carlstocker.com</p> <p>www.bestofamerica.com www.stockerwoods.com</p>	<p>Fixed and Variable Annuities</p>
<p>RSGROUP TRUST COMPANY PO Box 240 Frederick, MD 21705</p> <p>12 W. Church Street Frederick, MD 21701</p> <p>CS# 800.435.7024 Elayne Showell eshowell@quadsplans.com Fax: 301.698.4112</p>	<p>Thomas W. Anderson Trust Officer 1394 Forest Creek Drive Lewisville, TX 75067 214.536.0257 Fax: 972.420.0379 tanderson@rsgroup.com</p> <p>Jim Shirey 13750 Noel Road, Ste. 335 Dallas, TX 972.596.7776 jshirey@prodigy.net</p>	<p>www.rsgroup.com</p>	<p>Custodial Account 403(b)(7) Account using Mutual Funds</p>

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TIAA-CREF Herb Allison – Chair, President & CEO 730 Third Avenue New York, NY 10017 CS# 800.TIA.CREF	David Welker, Sr. Individual Consultant 5125 N. O’Connor, Ste 900 Las Colinas, TX 75039 800.842.2006 Ext. 7022 Fax: 972.869.2372 dwelker@tiaa-cref.org David Cathey, Sr. Individual Consultant 5125 N. O’Connor, Ste. 900 Las Colinas, TX 75039 800.842.2006 Ext. 7038 Fax: 972.869.2372 dcathey@tiaa-cref.org	www.tiaa-cref.org/texasorp	Fixed and Variable Annuities
USAA LIFE INSURANCE*** Edward R. Dinstel-Sr. V.P. 9800 Fredericksburg Road San Antonio, TX. 78288 210.498.8000 CS# 800.531.8292	Mike Douglass 800.531.8292 Kimber Snider 800.531.8292 USAA Financial Planning Services 9800 Fredericksburg Road San Antonio, TX. 78288	www.usaa.com	Fixed Annuities or TDA w/Mutual Fund Indicate:USAA Investment Management Co.

How do I decide which carrier to choose?

- A. Call a representative of the carrier and discuss your options with them. Examples of questions to ask:
- How have the carrier's annuities and/or funds performed overall, or how has a specific annuity/fund performed?
 - Regarding a particular annuity or mutual fund product, how risky is it?
 - What fees would I have to pay if I invest in your product(s)?
- B. Review information on the carrier's website if available.
- C. Review annuity company ratings with insurance/credit risk rating service companies such as Moody's and Standard & Poor's.
- www.moodys.com
 - www.standardandpoors.com
- D. Review mutual fund ratings with companies such as Morningstar.
- www.morningstar.com