

**UNIVERSITY OF NORTH TEXAS SYSTEM  
 OPTIONAL RETIREMENT PROGRAM (ORP) AND TAX-SHELTERED ANNUITIES (TSA)  
 AUTHORIZED PROVIDER LIST**

INVESTMENT COMPANY	AGENTS (CONTACT PERSON)	INTERNET ADDRESS	PROGRAMS
<b>FIDELITY INVESTMENTS</b>	<p><b>Miguel Salazar</b>            49 North 400 West SLG6A            Salt Lake City, UT 84101            972.795.1562 Fax: 972.910.5116  <a href="mailto:miguel.salazar@fmr.com">miguel.salazar@fmr.com</a>  <b>Office is located in Westlake, TX</b>  <b>Jason Brantley</b>            One Destiny Way WB2F            Westlake, TX 76262            817.694.7381 Fax: 508.229.9189  <a href="mailto:Jason.brantley@fmr.com">Jason.brantley@fmr.com</a></p>	<p><a href="http://www.fidelity.com">www.fidelity.com</a></p>	Mutual Funds
<b>ING</b>	<p><b>G. Thomas Swenson</b>            2220 San Jacinto Blvd., Ste. 315            Denton, TX 76205            940.387.2211, 800.925.3505 Fax: 940.382.3683            Email: <a href="mailto:GThomas.Swenson@INGFA.com">GThomas.Swenson@INGFA.com</a>  <b>Brenda Forcht</b>            15455 Dallas Pkwy, Ste 1250            Addison, TX 75001            972.643.6337, 800.714.3931 ext 4006337  <a href="mailto:brenda.forcht@ingfa.com">brenda.forcht@ingfa.com</a>  <b>Christopher Claassen</b>            Financial Advisor            Morgan Stanley Smith Barney            1000 Ballpark Way, Ste 209            Arlington, TX 76011            817. 276.5508            817. 276.5525 Fax  <a href="mailto:Christopher.Claassen@morganstanley.com">Christopher.Claassen@morganstanley.com</a></p>	<p><a href="http://www.orptx.com">www.orptx.com</a>   <a href="http://www.ingretirementplans.com/index.shtml">www.ingretirementplans.com/index.shtml</a></p>	Fixed and Variable Annuities

**UNIVERSITY OF NORTH TEXAS SYSTEM  
OPTIONAL RETIREMENT PROGRAM (ORP) AND TAX-SHELTERED ANNUITIES (TSA)  
AUTHORIZED PROVIDER LIST**

	<p><b>Zera J. Harris</b> 15455 Dallas Parkway Suite 1250 Addison, Texas 75001 Tel: 972.643.6391, Fax: 972.225.1532 800.714.3931, Ext. 4006391 <a href="mailto:zera.harris@ingfa.com">zera.harris@ingfa.com</a></p>		
<b>TIAA-CREF</b>	<p><b>David Welker</b> 2850 Lake Vista Drive, Ste. 200 Lewisville, TX 75067 Tel: 800.842.2006/214.626.8300, Fax: 214.488.3214 <a href="mailto:dwelker@tiaa-cref.org">dwelker@tiaa-cref.org</a></p> <p><b>Matthew Robertson</b> 2850 Lake Vista Drive, Ste. 200 Lewisville, TX 75067 Tel: 800.842.2006/214.626.8300, Fax: 214.488.3214 <a href="mailto:mrobertson@tiaa-cref.org">mrobertson@tiaa-cref.org</a></p>	<a href="http://www.tiaa-cref.org/unt">www.tiaa-cref.org/unt</a>	Fixed and Variable Annuities
<b>VALIC FINANCIAL ADVISORS</b>	<p><b>Mark Heck</b> 14643 Dallas Parkway, Ste. 775 Dallas, TX. 75254 972.977.1030 (c) Fax: 972.490.1773 Email: <a href="mailto:mark.heck@valic.com">mark.heck@valic.com</a></p>	<a href="http://www.valic.com">www.valic.com</a>	Fixed and Variable Annuities

**How Do I Decide Which Investment Provider to Choose?**

- A. Call representatives from the approved provider list above and
- B. Review information on the carrier's website.
- C. Review annuity company ratings with insurance/credit risk rating service companies such as Moody's and Standard & Poor's.
  - [www.moodys.com](http://www.moodys.com)
  - [www.standardandpoors.com](http://www.standardandpoors.com)
- D. Review mutual fund ratings with companies such as Morningstar. [www.morningstar.com](http://www.morningstar.com)