

## **Charlotte Public Schools Tax Deferred Annuity List**

The following tax deferred annuity companies and agents have been listed for employee participation by board policy:

<u>Company Listed by Board Policy</u>	<u>Servicing Agent</u>	<u>Telephone #</u>
Consolidated Financial	Lois Bergman	800-232-2383
Equitable	Robert Courtney Tate Schanksi	517-347-4646
Edward Jones Investments	Doug Freeman Mark Kraushaar	517-543-8040 517-541-1564
Ameriprise Financial Services (IDS)	Joe Stachnik Kelvin Caudell	517-543-4660 517-349-2880
MEA Financial Services	Karen Spotts	866-577-6887
Prudential Securities	Nick Yetter	616-388-7472
VALIC	Thomas E. Taylor	800-448-2542
Western Reserve Life Assurance Company	Clint Beebe Mark Frederickson Dana Wood	517-351-9799 517-543-7473 517-543-3380

It is a policy of the district not to analyze plans or endorse one tax deferred annuity plan over another. It is the employee's responsibility to study the plans and select the program which best serves the interest of the employee.