

Approved Tax Sheltered Annuity 403(b) Vendors

IMPORTANT changes coming fall 2008: The Arizona University System will be moving to three providers for TSA services in fall 2008. The selected providers are AIG Retirement, Fidelity Investments and TIAA-CREF. Effective later this fall (exact date has not been determined yet) salary deferrals will only be directed to these three providers.

Mutual Fund Companies

Ameriprise Financial

(520) 529-8145 Gary Biamonte; (520) 327-3299 Lee Cooper, Rebecca Johnson; (520) 514-6000 David Dales, James Harkin; (520) 748-2384 Beth Vance; (520) 325-3001 Bruce Irby; (520) 296-1032 Michael Reid; Sierra Vista – (520) 459-1652 Gene Del Vecchio

AXA Advisors

(520) 747-3373 Bill Moten, Vince Moll and Carl Guerrieri; (520) 512-5946 Robert Dorson; (520) 512-5924 Frank Youdelman; (480) 444-3749 Erik Pedersen

Fidelity Investments

(800) 343-0860; Fidelity Customer Service to request Enrollment Packet

Financial Directions

(520) 408-7777 Stan Spackeen, Tom Jones, Mary Cherba, John Anderson and Ray Martin

First Investors Corporation

(800) 486-1146 Brenda Carlson, Stuart Johnson, William Stead and Denise Zawada

The Legend Group

(520) 751-9798 or toll-free (888) 739-8865 Jim Leos, Rob Moore, Adam Pearce, Todd Sepp and Carolyn Wuertz

TIAA-CREF

(866) 548-3705, ext. 7709, Donn Fitch to request Enrollment Packet

Waddell and Reed, Inc.

(520) 745-3090 Jeff Bassett, Robert DeGrood, Anne Hutchins-Tatum and Jason Wong

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Annuity/Life Insurance Companies

AIG Retirement

(520) 795-8050 George Maytorena; (520) 275-4032 Gerry Petersen

Ameriprise Financial

(520) 529-8145 Gary Biamonte; (520) 327-3299 Lee Cooper, Rebecca Johnson; (520) 514-6000 David Dales, James Harkin; (520) 748-2384 Beth Vance; (520) 325-3001 Bruce Irby; (520) 296-1032 Michael Reid; Sierra Vista – (520) 459-1652 Gene Del Vecchio

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Commonwealth Annuity and Life Insurance Company (formerly Chase Investments)

(520) 326-6133 Jim Bishopp, Steve Bishopp; (520) 792-2288 Tom Moore

ING (AETNA) Life Insurance and Annuity Company

(520) 690-9201 John O. Brown; (520) 888-2761 William B. DeVinney; (602) 328-8633 Paul Sprague

Lincoln National Life (aka: Lincoln Financial Group)

(520) 290-8597 Crosby McDowell; (888) 574-5442 John Robertson; (866) 758-0972 Tina Dobias

Metropolitan Life Insurance

(520) 751-4919 William Babicke; (520) 293-9300 Brian Goldstein; (520) 319-0841 Mark Faber; (520) 881-5000 Lyle A. Deo (ext. 110), David R. Keefe (ext. 118)

Security Benefit Life

(520) 751-3823 Dave Hammond; (480) 967-8497 Ronald Przewlocki; (520) 884-7550 James Walker; (520) 907-3095 Adam W. Pearce; (520) 299-4686 Nancy Kelsey

TIAA-CREF

(866) 548-3705, ext. 7709, Donn Fitch to request Enrollment Packet

