

Mora Public Schools

2018-2019 Tax Sheltered Annuity Companies- Approved Vendors

1	AMEXP	
	Ameriprise Financial Services, Inc. 70100 AXP Financial Center Minneapolis, MN 55474	
	Brody Halverson (763)689-5686	
2	ASPIRE	
	Aspire Financial Services 1914 Centre Street Moorhead, MN 56560	
	Mike Simonich (218)284-3500 michael.simonich@lpl.com	
	Edward Jones 406 Washington Street West, Suite 3 Brainerd, MN 56401	
	Greg Bennett (218) 828-3929	
	Newton Financial Services 600 Main Street S, Suite 110 Cambridge, MN 55008	
	Peter Newton (763)552-8888 pnewton@newtonfinancialsolutions.com	
3	EQUITABLE	
	AXA Equitable Unit Annuity Collection PO Box 13463 Newark, NJ 07188-0463	
	Sunny Yee (612) 243-3209 Sunny.yee@AXA-Advisors.com	
4	EFS/ESI	
	Education MN ESI 33447 Xenon Drive Princeton, MN 55371	
	Matt Englund (763)777-0009 matte@efsadvisors.com	for new clients 2018
	Jason Janes (651)353-7984 jasonj@tsainvest.com	for existing clients prior to 2018
5	TRIVENT	
	Thrivent Financial 100 Forest Avenue East Mora, MN 55051	
	James Oxberry (320)679-5711 Melissa Weinreich (320)679-8365	
6	VALIC	
	7650 Edinborough Way, Ste 320 Edina, MN 55435	
	Randy Feehan (218)591-7905 randy.feehan@valic.com	
7	HORACE MANN	
	Horace Mann 633 Upland Avenue Suite #5 Elk River, MN 55330	
	Tom Wenner (763) 670-5636 tom.wenner@horacemann.com	
		Revised 8/22/16 jt
		Revised 9/27/16 km
		Reviewed 6/7/17 km
		Updated 2/27/18 km
		Updated 7/18/18 km