

Mora Public Schools

2017-2018 Tax Sheltered Annuity Companies- Approved Vendors

1	AMEXP		4	EFS/ESI	
	Ameriprise Financial Services, Inc.			Education MN ESI	
	70100 AXP Financial Center			33447 Xenon Drive	
	Minneapolis, MN 55474			Princeton, MN 55371	
	Brody Halverson (763)689-5686			Jason Janes (651)353-7984	
				jasonj@tsainvest.com	
				Investment options: TD Ameritrade Institutional Security Benefit Group	
2	ASPIRE				
	Aspire Financial Services				
	1914 Centre Street				
	Moorhead, MN 56560		5	TRIVENT	
	Mike Simonich (218)284-3500			Thrivent Financial	
	michael.simonich@lpl.com			100 Forest Avenue East	
	Edward Jones			Mora, MN 55051	
	406 Washington Street West, Suite 3			James Oxberry (320)679-5711	
	Brainerd, MN 56401			Melissa Weinreich (320)679-8365	
	Greg Bennett (218) 828-3929		6	VALIC	
				7650 Edinborough Way, Ste 320	
				Edina, MN 55435	
	Newton Financial Services			Randy Feehan (218)591-7905	
	600 Main Street S, Suite 110			randy.feehan@valic.com	
	Cambridge, MN 55008				
	Peter Newton (763)552-8888		7	HORACE MANN	
	pnewton@newtonfinancialsolutions.com			Horace Mann	
				633 Upland Avenue Suite #5	
				Elk River, MN 55330	
3	EQUITABLE				
	AXA Equitable			Tom Wenner (763) 670-5636	
	Unit Annuity Collection			tom.wenner@horacemann.com	
	PO Box 13463				
	Newark, NJ 07188-0463				
	Nick Loehlein (320)260-1279				
	Nicholas.loehlein@axa-advisors.com				
					Revised 8/22/16 jt
					Revised 9/27/16 km
					Reviewed 6/7/17 km