

Mora Public Schools

2020-2021 Tax Sheltered Annuity Companies- Approved Vendors

1	AMEXP		4	EFS/ESI	
	Ameriprise Financial Services, Inc. 70100 AXP Financial Center Minneapolis, MN 55474			Education MN ESI 33447 Xenon Drive Princeton, MN 55371	
	Brody Halverson (763) 689-5686			Matt Englund (763)777-0009 matte@efsadvisors.com	for new clients 2018
2	ASPIRE			Jason Janes (651)353-7984 jasonj@tsainvest.com	for existing clients prior to 2018
	Aspire Financial Services 1914 Centre Street Moorhead, MN 56560				
	Mike Simonich (218)284-3500 michael.simonich@lpl.com		5	TRIVENT	
	Edward Jones 406 Washington Street West, Suite 3 Brainerd, MN 56401			Thrivent Financial 100 Forest Avenue East Mora, MN 55051	
	Greg Bennett (218) 828-3929			James Oxberry (320)679-5711 Melissa Weinreich (320)679-8365	
	Newton Financial Services 600 Main Street S, Suite 110 Cambridge, MN 55008		6	AIG (fka VALIC)	
	Peter Newton (763)552-8888 pnewton@newtonfinancialsolutions.com			7650 Edinborough Way, Ste 320 Edina, MN 55435	
				Richard Caldecott (612) 322-1757 richard.caldecott@aig.com	
3	EQUITABLE		7	HORACE MANN	
	AXA Equitable Unit Annuity Collection PO Box 13463 Newark, NJ 07188-0463			Horace Mann 633 Upland Avenue Suite #5 Elk River, MN 55330	
	Sunny Yee (612) 243-3209 Sunny.yee@AXA-Advisors.com			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
					updated 6/24/20 kc