

Tax-Sheltered Annuity (TSA) Contact List

403(b) Retirement Plans & 457 Deferred Compensation Plans

Please contact the following providers for information and/or assistance with the Tax Sheltered Annuity 403(b) Retirement Plans and Deferred Compensation 457 Plans.

Fidelity, Lincoln, Nationwide, and VOYA are grandfathered in Plans—No new enrollments allowed

VALIC: 403(b) & 457

Alex Harriehausen
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Dida Langsdale
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Al Wishneff
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Roxann Murphy
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Richard Maurisma Sr.
305-817-2250
Richard.Maurisma@aig.com

Camilo Restrepo
305-433-1409
Camilo.Restrepo@aig.com

FIDELITY INVESTMENTS: 403(b)

1-800-343-0860
#51502 (Employer Plan Number)

LINCOLN FINANCIAL GROUP: 403(b) & 457

For assistance with your 403(b)
account call: 800-454-6265
For assistance with your 457
account call: 800-341-0441
For assistance with both plans
contact: Alejandro M. Jerez
CPWA®, CFP®, AIF®, AWMA®
Financial Planner
Heritage Financial Consultants, LLC
9100 S. Dadeland Blvd, Suite 300
Miami, FL 33156
Direct: 305-570-1816
Fax: 305-570-1906
Alejandro.Jerez@lfg.com
www.HeritageConsultants.com

NATIONWIDE RETIREMENT SOLUTIONS: 457

Aaron R. Schwartz
305-439-9550
schwara5@nationwide.com
#609177 (Employer Plan Number)

VOYA FINANCIAL 403(b) & 457

Stacey Sherbinsky
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