

# Canyons School District

9361 S 300 E Sandy, UT 84070 (801)826-5368

Tax Shelter Annuity Companies - updated 4/19/2021

## 401(k) & 457 Providers

Utah State Retirement (URS)
PO Box 1590 Salt Lake City, UT 84110-1590 (801) 366-7720 (801) 366-7445 Fax

THIRD PARTY ADMINISTRATOR:

US OMNI TSA

888-796-3786 opt. 4

### Active 403 (b) Companies & Agents

<b>American Century Investments</b>	<b>unassigned</b>
	(816) 531-5575
<b>Ameriprise Financial</b>	<b>TSA04</b>
<b>Jeremy Leavitt</b>	(801) 748-1733
8915 S 700 E Ste 104 Sandy, UT 84070-2421	<a href="mailto:jeremy.leavitt@ampf.com">jeremy.leavitt@ampf.com</a>
<b>AXA Advisors * Also Roth</b>	<b>TSA01</b>
<b>Jared Henderson</b>	(801) 733-2417
2825 E Cottonwood Pkwy, Ste 430 Salt Lake City, UT 84121	cell (801) 673-7271 <a href="mailto:jared.henderson@axa.com">jared.henderson@axa.com</a>
<b>Brandon Patrick</b>	(801) 303-5700
375 S 300 W 2nd Floor Salt Lake City, UT 841021	<a href="mailto:brandon@bp-retirement.com">brandon@bp-retirement.com</a>
<b>Grant Stewart</b>	619-990-2990
2825 E Cottonwood Pkwy, Ste 430 Salt Lake City, UT 84121	<a href="mailto:Grant.stewart@axa-advisors.com">Grant.stewart@axa-advisors.com</a>
<b>Fidelity</b>	<b>TSA12</b>
<b>Kade McKell - Divergent Wealth Adv</b>	(385) 237-4000
489 W South Jordan Parkway, Suite 3 South Jordan, UT 84095	Cell (385) 237-5712 <a href="mailto:kade.mckell@divergentwealth.com">kade.mckell@divergentwealth.com</a>
<b>Penserv (First Investors)</b>	
	(503)-296-7676
<b>GALIC Disbursing</b>	<b>TSA02</b>
<b>Drew Hill</b>	(801) 499-4523
610 N 900 W #100 Kaysville, UT 84037	(801) 544-8993 office <a href="mailto:dhill@planmembersec.com">dhill@planmembersec.com</a>
<b>Nicolas Snarr</b>	(801) 661-7115
160 West Canyon Crest Rd Alpine, UT 84004	<a href="mailto:nicolassnarr@appreciationfinancial.com">nicolassnarr@appreciationfinancial.com</a>
<b>Horace Mann</b>	<b>TSA03</b>
<b>Mario Pia &amp; Jamee Pia</b>	(801) 347-7880
2785 W 9000 S #122 West Jordan, UT 84084	(801) 566-2313c <a href="mailto:mario.pia@horacemann.com">mario.pia@horacemann.com</a>
<b>Met Life</b>	<b>TSA11</b>
<b>Francine Szakacs</b>	(908) 253-1739
501 U.S Hwy 22 Bridgewater, NJ 08807	<a href="mailto:fszakacs@metlife.com">fszakacs@metlife.com</a>

<b>National Life Group (LSW) *Also Roth</b>	<b>TSA15</b>
<b>Gregory Wade Brown (Wade)</b>	(801) 803-8637
160 West Canyon Crest Rd Alpine, UT 84004	<a href="mailto:gwbrown@appreciationfinancial.com">gwbrown@appreciationfinancial.com</a>
<b>Nicolas Snarr</b>	(801) 661-7115
160 West Canyon Crest Rd Alpine, UT 84004	<a href="mailto:nicolassnarr@appreciationfinancial.com">nicolassnarr@appreciationfinancial.com</a>
<b>Andrew Shirley (Drew)</b>	801-319-0705
160 West Canyon Crest Rd Alpine, UT 84004	<a href="mailto:ashirley@appreciationfinancial.com">ashirley@appreciationfinancial.com</a>
<b>Oppenheimer Funds</b>	<b>TSA08</b>
	(800) 525-7048
<b>Security Benefit Life *Also Roth</b>	<b>TSA10</b>
<b>Mark Miller</b>	(801) 446-2520
2838 W 9760 S South Jordan, UT 84095	<a href="mailto:markmiller@keystonefinancialedge.com">markmiller@keystonefinancialedge.com</a>
<b>Megan Palazzo</b>	(801) 661-7115
222- E Murray Hollady Rd #185 SLC UT 84117	<a href="mailto:megazzo185@gmail.com">megazzo185@gmail.com</a>
<b>Brian Stoker</b>	(801) 906-1331
10813 S River Front Pkwy #300 South Jordan, UT 84095	<a href="mailto:brianstoker@legendequities.com">brianstoker@legendequities.com</a>
<b>T Rowe Price</b>	<b>unassigned</b>
	(800) 922-9945
<b>Newport Trust Company (Vanguard)</b>	<b>TSA15</b>
<b>Variable Annuity Life</b>	<b>TSA09</b>
<b>(Arthur) Steve Leo</b>	(801) 521-9922
420 E South Temple Suite 430 Salt Lake City, UT 84111	<a href="mailto:steve.leo@valic.com">steve.leo@valic.com</a>
<b>VOYA</b>	<b>TSA07</b>
<b>Quinn Campbell</b>	(385) 458-9080
6695 S 1300 E Cottonwood Heights, UT 84121	(801) 458-9080 c <a href="mailto:qcampbell@rsgutah.com">qcampbell@rsgutah.com</a>
<b>Nathan Jackson</b>	(385)-800-2414
6695 S 1300 E Cottonwood Heights, UT 84121	(801) 458-9080 c <a href="mailto:qcampbell@rsgutah.com">qcampbell@rsgutah.com</a>
<b>Ross Wamsley</b>	
5237 Saddle Creek Circle West Jordan, UT 84081	<a href="mailto:rosswamsley@voyafa.com">rosswamsley@voyafa.com</a>