

Canyons School District
9361 S 300 E Sandy, UT 84070 (801)826-5368
Tax Shelter Annuity Companies - updated 10/21/2024

401(k) & 457 PROVIDER

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

THIRD PARTY ADMINISTRATOR:

US OMNI TSA	(888) 796-3786
Website:	TACG.com
Choose Online Distribution - start transaction	

ACTIVE 403 (b) COMPANIES & AGENTS

American Century Investments	unassigned
	(816) 531-5575
Ameriprise Financial	TSA04
Jeremy Leavitt	(801) 748-1733
8915 S 700 E Ste 104	
Sandy, UT 84070-2421	jeremy.leavitt@ampf.com
Corebridge (formerly VALIC)	TSA09
Michael Graff	(801) 631-1314
420 E South Temple Suite 430	
Salt Lake City, UT 84111	michael.graff@corebridgefinancial.com
Thomas Sautel	(385) 222-1661
420 E South Temple Suite 430	
Salt Lake City, UT 84111	thomas.sautel@corebridgefinancial.com
(Arthur) Steve Leo	(801) 521-9922
420 E South Temple Suite 430	
Salt Lake City, UT 84111	steve.leo@valic.com
Equitable (AXA) * Also Roth	TSA01
Jared Henderson	(801) 733-2417
2825 E Cottonwood Pkwy, Ste 430	(801) 673-7271 c
Salt Lake City, UT 84121	Jared.Henderson@equitable.com
Brandon Patrick	(801) 303-5700
375 S 300 W 2nd Floor	
Salt Lake City, UT 841021	brandon@bp-retirement.com
Mason Bailey	(801) 733-2491
2825 E Cottonwood Pkwy, Ste 430	mason.bailey@equitable.com
Salt Lake City, UT 84121	
Fidelity	TSA12
Kade McKell - Divergent Wealth Adv	(385) 429-7872
489 W South Jordan Parkway, Suite 3	(801) 910-9190 c
South Jordan, UT 84095	kade.mckell@divergentwealth.com
GALIC Disbursing	TSA02
Drew Hill	(801) 499-4523
610 N 900 W #100	(801) 544-8993 office
Kaysville, UT 84037	dhill@planmembersec.com
Nicolas Snarr	(801) 661-7115
160 West Canyon Crest Rd	
Alpine, UT 84004	nicolassnarr@appreciationfinancial.com
Horace Mann	TSA03
Preston Day	(801) 347-7880
	(801) 566-2313c
South Jordan, UT 84009	Preston.day@horacemann.com

Met Life	TSA11
Francine Szakacs	(908) 253-1739
501 U.S Hwy 22	
Bridgewater, NJ 08807	fszakacs@metlife.com
National Life Group (LSW) *Also Rot	TSA15
(Gregory) Wade Brown	(801) 803-8637
160 West Canyon Crest Rd	
Alpine, UT 84004	brown@appreciationfinancial.com
Nicolas Snarr	(801) 661-7115
160 West Canyon Crest Rd	
Alpine, UT 84004	nicolassnarr@appreciationfinancial.com
Aaron Lunt	(513) 967-6614
160 West Canyon Crest Rd	
Alpine, UT 84004	alunt@appreciationfinancial.com
Oppenheimer Funds	TSA08
	(800) 525-7048
Penserv	
	(800)-473-7888
Security Benefit Life *Also Roth	TSA10
Mark Miller	(801) 446-2520
2838 W 9760 S	
South Jordan, UT 84095	markmiller@keystonefinancialedge.com
Megan Palazzo	(801) 661-7115
222- E Murray Hollady Rd #185	
SLC UT 84117	megazzo185@gmail.com
Brian Stoker	(801) 906-1331
7396 S Union Park Ave, Ste 101	
Salt Lake City, UT 84047	brian@westridgeadvisors.com
T Rowe Price	unassigned
	(800) 922-9945
Vanguard (Ascensus Trust)	TSA15
VOYA	TSA07
Quinn Campbell	(385) 22-2203
5525 S 900 E Ste 145	(801) 458-9080 c
Salt Lake City, UT 84117	quinn@cofinancialgroup.com
Lorraine Umberger	(385) 722-2201
5525 S 900 E Ste 145	
Salt Lake City, UT 84117	lorraine@cofinancialgroup.com
Ross Wamsley	
5237 Saddle Creek Circle	
West Jordan, UT 84081	rosswamsley@voyafa.com