

## Collin College Authorized Tax Deferred Account (TDA) Provider List

Contact the representatives of any of the following organizations or visit the website for help in establishing your TDA or sometimes referred to as Tax Sheltered Accounts (TSA) investment. These representatives are also ready to help advise you on how to select the appropriate plan for you.

Company	Agent	Telephone	Addresses	City/State/Zip	Experience
American Century Investments <a href="https://www.americancentury.com">https://www.americancentury.com</a>		800-345-3533			
American United Life Insurance Co. <a href="http://www.oneamerica.com">www.oneamerica.com</a>		800-249-6269			
Americo <a href="http://www.americo.com">www.americo.com</a>		800-231-0801			
Annuity Investors Life Insurance (AILIC, subsidiary of Great American) <a href="http://www.greatamericaninsurancegroup.com/Annuities/Pages/default.aspx">http://www.greatamericaninsurancegroup.com/Annuities/Pages/default.aspx</a>		800-438-3398			
<u><a href="#">AXA EQUITABLE</a></u>	<u><a href="#">Amine Rizk</a></u> , CFP Divisional VP	972.455.9069	12377 Merit Drive, #1500	Dallas, TX 75251	Mr. Rizk has over 10 years experience and is an Investment Advisor Representative and Certified Financial Planner. Amine holds a Group I license, as well as the series 7, 66, and 24 licenses.
<u><a href="#">COMMONWEALTH ANNUITY &amp; LIFE</a></u>	<u><a href="#">Mr. Damian Caruso</a></u> <u><a href="#">Ms. April Spicer</a></u>	972.359.1827 972.814.787	P. O. Box 251606	Plano, TX 75025-1510	Mr. Caruso holds series

4  
214.630.803 8411 Dallas, TX 75225  
2 Preston Road,  
#104  
6, 63, and 65  
licenses.



**Fidelity Security Life**

www.fslins.com

800-648-8624

**First Investors**

www.forestersfinancial.com

800-423-4026

**FAM Funds**

http://www.famfunds.com/

800.721.5391

**Franklin Templeton**

www.franklintempleton.com

800-530-2432

**GWN Securities**

www.gwnsecurities.com

561-472-2700

**Horace Mann**

www.horacemann.com

800-999-1030

**VOYA FINANCIAL ADVISORS**

Ms. Brenda G. Forcht  
email: [brenda.forcht@voyafa.com](mailto:brenda.forcht@voyafa.com)

Lisa Emmons

972.643.6337  
7 Toll-free: 800.714.3931, ext. 4006337  
972.643.6316  
15455 Dallas Pkwy., Ste. 1250

Addison, TX 75001-6760

Ms. Forcht has 15 years experience and is a Registered Financial Advisor.



**ISC GROUP / MATC**

Mr. Hank Henderson

972.343.0072  
214.520.1115  
3500 Oaklaw n Avenue, Ste. 400

Dallas, TX 75219

Mr. Henderson has 15 years financial experience, holds Series 6, 63, 65 licenses and a Texas

Group I Life and Health license. He is also a Registered Investment Advisor.

Jefferson National Life Insurance Co.

<http://www.jeffnat.com/>

866-667-0561

The Legend Group

<http://www.legendgroup.com/>

800-749-4221

Life Insurance Company of the Southwest

[www.nationallife.com](http://www.nationallife.com)

800-906-3310

LINCOLN INVESTMENT PLANNING

Mr. Damian Caruso

972.359.182 P. O. Plano,  
7 Box TX 75025-  
972.814.787 251606 1510  
4

Mr. Caruso holds series 6, 63, and 65 licenses.

LINCOLN NATIONAL

Mr. Glenn Ferrell, CFP.CRPC

972.361.389 14911 Dallas,  
5 Quorum TX 75240  
Drive

Mr. Ferrell has over 25 years experience and holds Series 7 and 63 licenses. He is also an Investment Advisor Representative.

METLIFE RESOURCES

Mr. Chuck Mulkey

877.590.098 5400 Dallas,  
5, ext 61857 LBJ TX 75240  
214.395.748 Fwy,  
0 #1100

Chuck has over 20 years experience and holds Series 6 & 63 licenses.

Midland National Life Insurance Company

<http://www.midlandannuity.com/>

877-586-0240

Modern Woodmen of America

<http://www.modern-woodmen.org/>

800-447-9811

New York Life

<http://www.newyorklife.com/>

800-710-7945

North American Co. for Life and Health Insurance

<http://www.nacannuity.com/>

866-322-7065

Oppenheimer Funds Distributor, Inc.

<http://www.oppenheimerfunds.com/>

800-225-5677

**PENTEGRA RETIREMENT SERVICES**

[Mr. James Shirey](#), CFP

[Mr. Bruce Lanahan](#)

972.386.428 13760 Dallas,  
1, ext. 107 Noel TX 75240

214.647.173 Rd.,  
4 #335 Dallas,  
LB 30 TX 75225

8411  
Preston  
Road,  
#104

PlanMember Services

<http://www.planmember.com/>

800-874-6910

Putnam Investments

<http://www.putnam.com/>

800-662-0019

RiverSource Investments, LLC (Ameriprise)

<http://www.ameriprise.com/>

800-862-7919

Rydex

<http://www.guggenheiminvestments.com/>

800-820-0888

**SECURITY BENEFIT LIFE**

[Mr. Mark Heck](#)

972.977.103 2740 Farmers  
0 Farmers Branch,  
s TX 75234

Mr. Heck has  
six years  
experience  
and holds

			Branch Lane		Series 6, 66, and 7 licenses. He is also a Registered Investment Advisor.
<b>Symetra</b> <a href="http://www.symetra.com/">http://www.symetra.com/</a>		800-796-3872			
<b>Thrivent Financial for Lutherans</b> <a href="http://www.thrivent.com/">http://www.thrivent.com/</a>		800-847-4836			
<b><u>TIAA-CREF</u></b>	<b><u>Mr. Tony Rhee</u></b> Wealth Management Advisor	214.626.8005 Fax: 214.488.3214	2850 Lake Vista Drive, Suite #110	Lewisville, TX 75067	
<b>Transamerica Life Insurance Company</b> <a href="http://www.oneamerica.com/">http://www.oneamerica.com/</a>		800-317-2688			
<b>USAA Investment Mgmt Company</b> <a href="http://www.usaa.com/">http://www.usaa.com/</a>		800-531-8292			
<b><u>VALIC</u></b>	<b><u>Mr. Dennis D. Malcolm,</u></b> Financial Advisor - Southwest Region-North, Texas District	469.540.5444	2745 Dallas Parkwa y, Suite #480	Plano, TX 75093	Securities and investment advisory services are offered by VALIC Financial Advisors, Inc., member FINRA, SIPC, and an SEC-

registered  
investment  
advisor.

Vanguard

<http://www.vanguard.com/>

Waddell & Reed

<http://www.waddell.com/>

Western National Life Insurance Company

<http://www.westernnational.com/>

800-962-  
5068

800-923-  
3355

800-424-  
4990

