

Collin College Authorized Optional Retirement Program (ORP) Provider List

Contact the representatives of any of the following organizations or visit the website for help in establishing your ORP Investment. These representatives are also ready to help advise you on how to select the appropriate plan for you.

Company	Agent	Telephone	Address	City/State/Zip	Experience
<u>AXA EQUITABLE</u>	<u>Amine Rizk</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>COMMONWEALTH ANNUITY & LIFE</u>	<u>Mr. Damian Caruso</u> <u>Ms. April Spicer</u>	972.359.1827 972.814.7874 214.630.8032	P. O. Box 251606 8411 Preston Road, #104	Plano, TX 75025-1510 Dallas, TX 75225	Mr. Caruso holds series 6, 63, and 65 licenses.
<u>ING FINANCIAL ADVISORS (now VOYA)</u>	<u>Ms. Brenda G. Forcht</u> email: brenda.forcht@voyafa.com Lisa Emmons	972.643.6337 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.
<u>ISC GROUP / MATC</u>	<u>Mr. Hank Henderson</u>	972.342.0072 214.520.1115	3500 Oaklawn 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.
<u>LINCOLN INVESTMENT PLANNING</u>	<u>Mr. Damian Caruso</u>	972.359.1827 972.814.7874	P. O. Box 251606	Plano, TX 75025-1510	Mr. Caruso holds series 6, 63, and 65 licenses.
<u>LINCOLN NATIONAL</u>	<u>Mr. Glenn Ferrell</u> , CFP.CRPC	972.361.3895	14911 Quorum Drive	Dallas, TX 75240	Mr. Ferrell has over 25 years experience and holds Series 7

and 63 licenses. He is also an Investment Advisor Representative.

<u>METLIFE RESOURCES</u>	Mr. Chuck Mulkey	877.590.0985, ext 61857 214.395.7480	5400 LBJ Fwy, #1100	Dallas, TX 75240	Mr. Mulkey has over 20 years experience and holds Series 6 & 63 licenses.
<u>PENTEGRA RETIREMENT SERVICES</u>	Mr. James Shirey , CFP Mr. Bruce Lanahan	972.386.4281, ext. 107 214.647.1734	13760 Noel Rd., #335 LB 30 8411 Preston Road, #104	Dallas, TX 75240 Dallas, TX 75225	
<u>SECURITY BENEFIT LIFE</u>	Mr. Mark Heck	972.977.1030	2740 Farmers Branch Lane	Farmers Branch, TX 75234	Mr. Heck has six years experience and holds Series 6, 66, and 7 licenses. He is also a Registered Investment Advisor.
<u>TIAA-CREF</u>	Mr. Tony Rhee Wealth Management Advisor	214.626.8005 Fax: 214.488.3214	2850 Lake Vista Drive, Suite #110	Lewisville, TX 75067	
<u>VALIC</u>	Mr. Dennis D. Malcolm , Financial Advisor - Southwest Region-North, Texas District	469.540.5444	2745 Dallas Parkway, Suite #480	Plano, TX 75093	Securities and investment advisory services are offered by VALIC Financial Advisor, Inc., member FINRA, SIPC and an SEC-registered investment advisor.