



# Authorized Vendors for Tax Sheltered Annuities & Optional Retirement Plans

HUMAN RESOURCES

JANUARY 2017

## FIDELITY INVESTMENTS

403 (b)  
Mutual Funds

Agent: BRIAN K. BAKER  
Phone: (800) 300-1706  
Fax: (508) 460-5538  
Email: [brian.baker@fmr.com](mailto:brian.baker@fmr.com)

## FIDELITY INVESTMENTS

(800) 343-0860  
One Destiny Way  
Westlake, TX 76262

## LINCOLN NATIONAL LIC

403 (b)  
Multiple Fund  
Variable Annuity  
Fixed Annuity

Agent: BOB MCKNIGHT  
Phone: (936) 564-2307  
Fax: (936) 564-3016  
Address: 1407 N. University, Suite A  
Nacogdoches, TX 75961

## WES MCKNIGHT

(936) 564-2307  
(936) 564-3016  
1407 N. University, Suite A  
Nacogdoches, TX 75961

## PENTEGRA

403 (b)  
Mutual Funds

Agent: KATHY DIDUCH  
Phone: (800) 683-5463  
Fax: (903) 561-6787  
Address: 6725 Highlands Court  
Tyler, TX 75703  
Email: [kdiduch@lincolninvestment.com](mailto:kdiduch@lincolninvestment.com)

## TIAA-CREF

403 (b)  
Mutual Funds  
Fixed & Variable Products

Agent: JOY DOSS  
Phone: (972) 745-9867  
Fax: (214) 488-3214  
Address: 2850 Lake Vista Dr. Suite 200  
Lewisville, TX 75067

## MATTHEW ROBERTSON

(800) 842-2006  
(972) 869-2372  
5215 N. O'Connor Blvd. Suite 900  
Las Colinas, TX 75039

## USAA LIC

403 (b)  
Fixed/Guaranteed Annuity  
Mutual Funds

Agent: RETIREMENT PLAN COUNSELOR  
Phone: (800) 531-8000 ext 84539  
Address: USAA Building  
San Antonio, TX 78288

## VALIC

403 (b)  
Variable Annuity  
Mutual Funds  
Fixed Annuity

Agent: JEREMY KING  
Phone: (817) 522-8384  
Fax: (469) 212-1191  
Address: 2745 Dallas Parkway, Suite 480  
Plano, TX, 75093  
Email: [Jeremy.King@valic.com](mailto:Jeremy.King@valic.com)

## ANNE MOORE

Direct: (936) 560-7004  
Office: (936) 560-3930  
1323 N. University Drive  
Nacogdoches TX 75965  
[ann.moore@wfadvisors.com](mailto:ann.moore@wfadvisors.com)

## VOYA FINANCIAL

403 (b)  
Fixed Annuity  
Variable Annuity

Agent: JAMES GRAY  
Phone: (903) 566-1007  
Fax: (903) 566-1094  
Address: 10975 Spur 248, Suite 104  
Tyler, TX 75707  
[james.gray@arringtonfinancial.com](mailto:james.gray@arringtonfinancial.com)

## TERRY MEBANE

(903) 539-6400  
(903) 509-2299  
212 Old Grande Blvd. Suite A214  
Tyler, Texas 75703  
[terry.mebane@voyafa.com](mailto:terry.mebane@voyafa.com)

## WADDELL & REED

403 (b)  
Mutual Funds  
W&R Funds, Ivy Funds

Agent: JERRY CUTAIA  
Phone: (281) 852-1130  
Fax: (281) 852-0405  
Address: 5510 Atascocita Rd.  
Suite 150  
Humble, TX 77346

## TIMOTHY J. NEUMANN

(281) 852-1130  
(281) 852-0405  
5510 Atascocita Rd.  
Suite 150  
Humble, TX 77346

LUMBERJACKS MAKE GREAT EMPLOYEES