

**TEXAS TECH UNIVERSITY SYSTEM  
OPTIONAL RETIREMENT PROGRAM (ORP) AND  
TAX DEFERRED ACCOUNT PROGRAM (TDA)  
AUTHORIZED COMPANIES AND APPROVED REPRESENTATIVES  
June 1, 2018**

*Eligible employees interested in the Optional Retirement Program (ORP), or employees interested in the Tax Deferred Account Program (TDA) should contact listed representatives concerning details of annuity contracts or custodial mutual funds accounts. Employees may enroll with the vendor of their choice.*

**VALIC [www.valic.com](http://www.valic.com)  
(Custodial Mutual Fund Accounts)**

Stephen Johns  
2745 Dallas Parkway, Ste. 480, Plano, TX 75093  
Tel: Office: 432-230-1069, Fax: 432-699-0769, Email: [stephen.johns@valic.com](mailto:stephen.johns@valic.com)

Kerry Norwood  
2745 Dallas Parkway, Ste. 480, Plano, TX 75093  
Cell: 432-770-5857, Fax: 844-410-4502, Email: [kerry.norwood@valic.com](mailto:kerry.norwood@valic.com)

Manuel Pedroza, Jr.  
1200 Golden Key Circle, Ste. 101, El Paso, TX 79925  
Tel: 915-599-7610, Fax: 915-598-3456, Email: [manuel.pedroza@valic.com](mailto:manuel.pedroza@valic.com)

**TIAA <http://enroll.tiaa-cref.org/ttu/>  
(Fixed & Variable Annuities and Custodial Mutual Fund Accounts)**

Joy Doss  
2850 Lake Vista Drive, Ste. 110, Lewisville, TX 75067  
Tel: 972-745-9867, Office: 800-842-2006 Ext. 219867, Fax: 214-488-3214, Email: [jdoss@tiaa.org](mailto:jdoss@tiaa.org)

Sean Mossman  
2850 Lake Vista Drive, Ste. 110, Lewisville, TX 78067  
Tel: 214-626-8317, Fax: 214-488-3214, Office: 800-842-2006 Ext. 218317  
Email: [smossman@tiaa.org](mailto:smossman@tiaa.org)

Matthew Robertson  
2850 Lake Vista Drive, Ste. 110, Lewisville, TX 75087  
Tel: 214-626-8323, Office: 800-842-2006 Ext. 218323, Fax: 214-488-3214,  
Email: [mrobertson@tiaa.org](mailto:mrobertson@tiaa.org)

**PENTEGRA RETIREMENT SERVICES, INC ( Formerly RS Trust Group Co.)**

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

**(Custodial Mutual Fund Accounts)**

Caleb Byrd

M.C. Byrd Wealth Management & The 401k Shop

633 W. Main, Ste. B, Bellville, TX 77418

Tel: 979-865-0660, Fax: 979-865-0688 Email: [caleb@mcbrydwealth.com](mailto:caleb@mcbrydwealth.com)

Monte Byrd, ChFC

M.C. Byrd Wealth Management & The 401k Shop

633 W. Main, Ste. B, Bellville, TX 77418

Tel: 979-865-0660, Fax: 979-865-0688 Email: [monte@mcbrydwealth.com](mailto:monte@mcbrydwealth.com)

Scott R. Dickerson

720 S. Tyler, Ste. 102, Amarillo, TX 79101

Tel: 806-331-2600, Fax: 806-331-2604, Email: [sdickerson@navigationfinancial.com](mailto:sdickerson@navigationfinancial.com)

Ruben Guerra

Guerra Investment Advisors

201 East Main, El Paso, TX 79901

Tel: 915-760-5551, Email: [reg@guerrainvestments.com](mailto:reg@guerrainvestments.com)

Andy Holt

Financial Advisors at Securities America, Inc.

1319 4<sup>th</sup> Avenue, Canyon, TX 79015

Tel: 806-656-0252, Email: [aholt@navigationfinancial.com](mailto:aholt@navigationfinancial.com)

Heather Jendrusch

M.C. Byrd Wealth Management & The 401k Shop

633 W. Main, Ste. B, Bellville, TX 77418

Tel: 979-865-0660, Fax: 979-865-0688 Email: [heather@bmbrydwealth.com](mailto:heather@bmbrydwealth.com)

Jeffery Kesting

Kesting Financial Services, LLC

401 Azalea Court, Sulfur Springs, TX 75482

Tel: 214-883-0705

Matthew D. Peck

Amicus Financial Advisors, LLC

1661 Broadway, Lubbock, TX 79401

Tel: 806-392-4405, Fax: 888-826-4287, Email: [mpeck@amicusadvisors.com](mailto:mpeck@amicusadvisors.com)

Eric Sawyer, CFP

Peacefield Wealth Solutions, LLC

2613 76<sup>th</sup> Street

Lubbock, TX 79423

Tel: 214-794-0193, Fax: 214-594-3565, Email: [esawyer@peacefieldwealth.com](mailto:esawyer@peacefieldwealth.com)

Regina Franklin  
Amicus Financial Advisors, LLC  
3814 24<sup>th</sup> Street  
Lubbock, TX 79410  
Tel: 806-698-1122, Cell: 806-239-4494, Email: [redina@amicusadvisors.com](mailto:redina@amicusadvisors.com)

**METLIFE RESOURCES** [https://www.metlife.com/?WT.ac=GN\\_individual\\_retirement](https://www.metlife.com/?WT.ac=GN_individual_retirement)

**(Fixed & Variable Annuities)**

Joseph (Tony) Soto  
Two Galleria Tower, 13455 Noel Road, 20<sup>th</sup> Floor, Dallas, TX 75240  
Cell: 915-443-4100, Tel: 432-570-1767, Fax: 855-391-1927, Email: [jsoto@financialguide.com](mailto:jsoto@financialguide.com)

**LINCOLN FINANCIAL GROUP** [www.lincolfinancial.com/TexasTech](http://www.lincolfinancial.com/TexasTech)  
**(Custodial Mutual Fund Accounts)**

Emmanuel Allende  
3817 Constitution Drive, Suite 100  
El Paso, TX 79922  
Tel: 915-543-5630, Fax: 915-543-5629, Email: [emmanuel.allende@lfg.com](mailto:emmanuel.allende@lfg.com)

Michael All, CRPS  
PO Box 631812  
Houston, TX 77263  
Tel: 682-347-8728, Fax: 484-583-2019, Email: [michael.allen@lfg.com](mailto:michael.allen@lfg.com)

Joseph Anselmi, CRPC  
25420 Kuykendahl Rd. Unit C300  
Tomball, TX 77375  
Cell: 281-684-7772, Tel: 281-880-9955, Fax: 281-880-5288, Email: [joseph.anselmi@lfg.com](mailto:joseph.anselmi@lfg.com)

Jay Eagan  
6010 82<sup>nd</sup> Street, Ste. 100, Lubbock, TX 79424  
Tel: 806-791-8504, Fax: 806-795-0129 Email: [jay@advisorspfg.com](mailto:jay@advisorspfg.com)

Van Echols  
6010 82<sup>nd</sup> Street, Ste.100, Lubbock, TX 79424  
Tel: 806-791-8551, Fax: 806-795-5979 Email: [van@advisorspfg.com](mailto:van@advisorspfg.com)

Michael D. Ivey  
5214 68<sup>th</sup> Street, Suite 100, Lubbock, TX 79424  
Tel: 806-798-0045, Fax: 806-798-0335, Email: [mikeivey@rfslubbock.com](mailto:mikeivey@rfslubbock.com)

Larry Springer  
3309 67<sup>th</sup> Street, Suite 8, Lubbock, TX 79413  
Tel: 806-749-3000, Fax: 806-798-0047, Email: [larry.springer@lfg.com](mailto:larry.springer@lfg.com)

Marshall Barclay  
4130 Rio Bravo St., Ste A-100, El Paso, TX 79902  
Tel: 915-543-5630, Fax: 915-543-5629, Email: [marshall.barclay@lfg.com](mailto:marshall.barclay@lfg.com)

Samuel (Sammy) C. Biggers,  
5214 68<sup>th</sup>, Suite 100, Lubbock, TX 79424  
Tel: 806-798-0045, Fax: 806-798-0057, Email: [Sammy.biggers@rfslubbock.com](mailto:Sammy.biggers@rfslubbock.com)

Steve DeGroat  
130 Rio Bravo, Suite A-100, El Paso, TX 79902  
Tel: 915-543-5630, Fax: 915-543-5629, Email: [steve.degroat@lfg.com](mailto:steve.degroat@lfg.com)

C. Anderson Lambeth  
4130 Rio Bravo St., Ste. A-100, El Paso, TX 79902-1002  
Tel: 915-543-5630, Fax: 915-543-5629, Email: [alambeth@elpasolfa.com](mailto:alambeth@elpasolfa.com)

T. Scott Maples  
6010 82<sup>nd</sup> Street, Ste. 100, Lubbock, TX 79424  
Tel: 806-791-8519, Fax: 806-795-1371 Email: [scott@advisorspfg.com](mailto:scott@advisorspfg.com)

Doug Naegele  
6010 82<sup>nd</sup> Street, Ste. 100, Lubbock, TX 79424  
Tel: 806-791-8524, Fax: 806-795-5979 Email: [doug@advisorspfg.com](mailto:doug@advisorspfg.com)

Brian Pitaniello – PFG Advisors  
6010 82<sup>nd</sup> Street, Ste. 100, Lubbock, TX 79424  
Tel: 806-791-8557 Fax: 806-795-5979 Email: [brian@advisorspfg.com](mailto:brian@advisorspfg.com)

Chris Scioli  
6010 82<sup>nd</sup> Street, Ste. 100  
Lubbock, TX 79424  
Tel: 806-791-8574, Fax: 806-795-1371 Email: [cscioli@financialguide.com](mailto:cscioli@financialguide.com)

Paul Scioli – PFG Advisors  
4412 74<sup>th</sup> Street, Ste. A100, Lubbock, TX 79424  
Tel: 806-784-0615, Fax: 806-741-1160 Email: [paul@advisorspfg.com](mailto:paul@advisorspfg.com)

John R. Wedel  
4130 Rio Bravo St., Ste. A-100, El Paso, TX 79902-1002  
Tel: 915-543-5630: Fax: 915-543-5629, Email: [jwedel@elpasolfa.com](mailto:jwedel@elpasolfa.com)

Jeffrey Zamora  
6010 82<sup>nd</sup> Street, Ste. 100, Lubbock, TX 79424  
Tel: 806-791-8556, Fax: 806-795-5979 Email: [jeff@advisorspfg.com](mailto:jeff@advisorspfg.com)

**VOYA FINANCIAL SERVICES (Formerly ING) <https://texastech.beready2retire.com>**  
**(Custodial Mutual Fund Accounts)**

Leigh V. Bloss  
401 E. Main Dr, Ste 404, El Paso, TX 79901  
Tel: 915-543-4900, Fax: 915-, Email: [leigh.bloss@voyafa.com](mailto:leigh.bloss@voyafa.com)

Kirk Haworth  
6900 I-40 West, Suite 160, Amarillo, TX 79106  
Tel: 806-358-1381, Fax: 806-353-2366, Email: [kirk.haworth@voyafa.com](mailto:kirk.haworth@voyafa.com)

Joel Hernandez  
523 Homsley Trail, El Paso, TX 79907  
Tel: 915-543-4902, Fax: 915-858-4045, Email: [joel.hernandez@voyafa.com](mailto:joel.hernandez@voyafa.com)

Donald K. Leonard, Jr.  
8008 Slide Rd. #4, Lubbock, TX 79423  
Tel: 806-798-7048, Fax: 806-798-7018, Email: [keith.leonard@voyafa.com](mailto:keith.leonard@voyafa.com)

Erika Marin  
4545 Hondo Pass Ste. C, El Paso, TX 79904  
Tel: 915-759-6393, Fax: 915-855-7143, Email: [Erika.marin@lpl.com](mailto:Erika.marin@lpl.com)

Brett Phillips  
14636 Dallas Pkwy, Ste. 650, Dallas, TX 75254  
Tel: 972-643-6332, Fax: 972-442-6787, Email: [brett.phillips@voyafa.com](mailto:brett.phillips@voyafa.com)

Jamie Phillips  
5611 Rio Grande, Midland, TX 79707  
Tel: 432-520-8335, Email: [Jamie.phillips@voyafa.com](mailto:Jamie.phillips@voyafa.com)

Joel Suarez  
611 University Ave, Ste. 240, Lubbock, TX 79401  
Tel: 806-796-3476, Fax: 806-771-0348, Email: [joel.suarez@voyafa.com](mailto:joel.suarez@voyafa.com)

**FIDELITY INVESTMENTS [www.netbenefits.com/ttu](http://www.netbenefits.com/ttu)**  
**(Custodial Mutual Fund Accounts)**

Brian Baker  
One Destiny Way, Westlake, TX 76262  
Tel: 469-323-2004, Email: [brian.baker@fmr.com](mailto:brian.baker@fmr.com)

Michael Quiroga, Workplace Planning and Guidance Consultant  
1576 East Southlake Blvd. Southlake, TX 76262  
Tel : 972-310-1541, Fax : 801-519-3091, Email : [michael.quiroga@fmr.com](mailto:michael.quiroga@fmr.com)

Miguel Salazar  
1576 East Southlake Blvd. Southlake, TX 76262  
Tel: 972-795-1562, Fax: 972-910-5116, Email: [miguel.Salazar@fmr.com](mailto:miguel.Salazar@fmr.com)

**Empower Retirement**  
**(Custodial Mutual Fund Accounts)**

**For Enrollment and Contract Information Call: 1-866-467-7756**  
[www.empower-retirement.com/participant](http://www.empower-retirement.com/participant)

**GLOBAL ATLANTIC [www.globalatlantic.com](http://www.globalatlantic.com)**  
**(Fixed & Variable Annuities)**

Anthony R. Morris  
1420 Geronimo, Bldg. C-130, El Paso, TX 79925  
Tel: 806-747-0277, Fax: 915-778-9101, Email: [amorris@mormac.net](mailto:amorris@mormac.net)

Christina Winters Gears  
5201 North O'Connor Blvd, Suite 200, Irving, TX 75062  
Tel: 972-831-8866, Fax: 972-831-8877, Email: [christina@cmwfinancial.com](mailto:christina@cmwfinancial.com)

Joan R Arciero  
5201 North O'Connor Blvd, Suite 200, Irving, TX 75039  
Tel: 972-831-8866, Fax: 972-831-8877, Email: [joan@cmwfinancial.com](mailto:joan@cmwfinancial.com)