

**University of North Texas/University of North Texas System**  
**OPTIONAL RETIREMENT PROGRAM AND TAX DEFERRED ACCOUNTS (ORP/TDA)**  
**AUTHORIZED CARRIERS LIST**

COMPANY PRESIDENT/ GENERAL COUNSEL	AGENTS (CONTACT PERSON)	CARRIER INTERNET ADDRESS	PROGRAMS
<b>AIG VALIC FINANCIAL ADVISORS</b> Darlene Daily- District Manager 14643 Dallas Pkwy, #775 Dallas, TX. 75254 972.383.7212  <b>CS# 800.428.2542</b>	<b>Mark Heck</b> 972.977.1030 (c) Fax: 972.490.1773 Email: <a href="mailto:mark.heck@aigretirement.com">mark.heck@aigretirement.com</a> 14643 Dallas Parkway, Ste. 775 Dallas, TX. 75254	<a href="http://www.aigvalic.com">www.aigvalic.com</a>	Fixed and Variable Annuities
<b>CHASE INSURANCE COMPANY</b> Scott Dumbauld, Sr. VP Chase Insurance Company 2500 Westfield Drive Elgin, Illinois 30123 847.930.7000  <b>CS# 800.621.5001</b>	<b>Damian J. Caruso</b> PO Box 251606 Plano, TX. 75025 972.359.1827 Fax: 972.359.1828 Email: <a href="mailto:dcarus@lincolninvestment.com">dcarus@lincolninvestment.com</a>	<a href="http://www.chaseinsurancecompany.com">www.chaseinsurancecompany.com</a>	Fixed and Variable Annuities
<b>CITISTREET</b> Mark Skinner-President PO Box 6723 Somerset, NJ 08875-6723  <b>CS# 800.521.7503</b>	<b>David Piccolo</b> 940.367.4014 Fax: 940.243.1644 Email: <a href="mailto:dpiccolo@metlife.com">dpiccolo@metlife.com</a> <b>Michael Carrizales, FSR</b> 2805 North Dallas Pkwy Ste 215 Plano, TX 75093 800.236.8489 Email: <a href="mailto:mcarrizales@metlife.com">mcarrizales@metlife.com</a> <b>MetLife Resources</b> 2745 N. Dallas Parkway, Ste 130 Plano, TX. 75093	<a href="http://www.travelersla.com">www.travelersla.com</a>	Fixed and Variable Annuities



**University of North Texas/University of North Texas System**  
**OPTIONAL RETIREMENT PROGRAM AND TAX DEFERRED ACCOUNTS (ORP/TDA)**  
**AUTHORIZED CARRIERS LIST**

<b>COMPANY PRESIDENT/ GENERAL COUNSEL</b>	<b>AGENTS (CONTACT PERSON)</b>	<b>CARRIER INTERNET ADDRESS</b>	<b>PROGRAMS</b>
<b>LINCOLN NATIONAL LIFE</b> Rachel Knapp Southeast Relationship Manager 3436 Long Prairie, Ste. 108-184 Flower Mound, TX 75022 866.266.7972 phone 260.455.0196 fax <a href="mailto:Rachel.knapp@lfg.com">Rachel.knapp@lfg.com</a> <b>CS# 800.454.6265</b>	<b>Glenn Ferrell, CFP</b> 14911 Quorum Ste. 300 Dallas, TX 75240-7534 972.361.3895, 800.999.2559 Fax: 972.960.6847 Email: <a href="mailto:glenn.ferrell@lfg.com">glenn.ferrell@lfg.com</a>	<a href="http://www.LFG.com">www.LFG.com</a>	Fixed and Variable Annuities
<b>METLIFE RESOURCES</b> James J. Hughes 1331 17 <sup>th</sup> St. P.O. Box 1019 Denver, CO 80201  <b>CS# 800.962.8320</b>	<b>David Piccolo</b> 940.367.4014 Fax: 940.243.1644 Email: <a href="mailto:dpiccolo@metlife.com">dpiccolo@metlife.com</a> <b>Michael Carrizales</b> 2805 North Dallas Pkwy Ste 215 Plano, TX 75093 800.236.8489 Email: <a href="mailto:mcarrizales@metlife.com">mcarrizales@metlife.com</a> <b>MeltLife Resources</b> 2745 N. Dallas Parkway, Suite 130 Plano, TX. 75093	<a href="http://www.metlife.com">www.metlife.com</a>	Fixed and Variable Annuities

**University of North Texas/University of North Texas System**  
**OPTIONAL RETIREMENT PROGRAM AND TAX DEFERRED ACCOUNTS (ORP/TDA)**  
**AUTHORIZED CARRIERS LIST**

<b>COMPANY PRESIDENT/ GENERAL COUNSEL</b>	<b>AGENTS (CONTACT PERSON)</b>	<b>CARRIER INTERNET ADDRESS</b>	<b>PROGRAMS</b>
<p><b>RSGROUP TRUST COMPANY</b>            PO Box 240            Frederick, MD 21705</p> <p>12 W. Church Street            Frederick, MD 21701</p> <p><b>CS# 800.435.7024</b>            Elayne Showell  <a href="mailto:eshowell@quadsplans.com">eshowell@quadsplans.com</a>            Fax: 301.698.4112</p>	<p><b>Thomas W. Anderson</b>            Trust Officer            1394 Forest Creek Drive            Lewisville, TX 75067            214.536.0257 Fax: 972.420.0379  <a href="mailto:tanderson@rsgroup.com">tanderson@rsgroup.com</a></p> <p><b>Jim Shirey</b>            13750 Noel Road, Ste. 335            Dallas, TX            972.596.7776  <a href="mailto:jshirey@prodigy.net">jshirey@prodigy.net</a></p>	<p><a href="http://www.rsgroup.com">www.rsgroup.com</a></p>	<p>Custodial            Account            403(b)(7)            Account using            Mutual Funds</p>
<p><b>TIAA-CREF</b></p> <p>Roger Ferguson            President &amp; CEO            TIAA-CREF            730 Third Ave.            New York, NY 10017</p> <p><b>CS# 800.TIA.CREF</b></p>	<p><b>David Welker, Sr. Individual Consultant</b>            5215 N. O'Connor, Ste 900            Las Colinas, TX 75039            800.842.2006 Ext. 7022 Fax: 972.869.2372  <a href="mailto:dwelker@tiaa-cref.org">dwelker@tiaa-cref.org</a></p> <p><b>Matthew Robertson, Senior Consultant</b>            5215 N. O'Connor, Ste. 900            Las Colinas, TX 75039            800.842.2006 Ext. 7027 Fax: 972.869.2372  <a href="mailto:mrobertson@tiaa-cref.org">mrobertson@tiaa-cref.org</a></p>	<p><a href="http://www.tiaa-cref.org/texasorp">www.tiaa-cref.org/texasorp</a></p>	<p>Fixed and            Variable            Annuities</p>

**University of North Texas/University of North Texas System**  
**OPTIONAL RETIREMENT PROGRAM AND TAX DEFERRED ACCOUNTS (ORP/TDA)**  
**AUTHORIZED CARRIERS LIST**

COMPANY PRESIDENT/ GENERAL COUNSEL	AGENTS (CONTACT PERSON)	CARRIER INTERNET ADDRESS	PROGRAMS
<b>USAA LIFE INSURANCE</b> <b>USAA FINANCIAL PLANNING</b> <b>SERVICES</b> Edward R. Dinstel – Sr. V.P. 9800 Fredericksburg Road San Antonio, TX 78288 210.498.8000  <b>CS# 800.531.8292</b>	<b>MIKE DOUGLASS</b> 800.531.8292  <b>Kimber Snider</b> 800.531.8292	<a href="http://www.usaa.com">www.usaa.com</a>	Fixed Annuities or TDA w/Mutual Fund Indicate: USAA Investment Management Company

**How Do I Decide Which Carrier to Choose?**

- A. Call a representative of the carrier and discuss your options with them. Examples of questions to ask:
  - How have the carrier's annuities and/or funds performed overall, or how has a specific annuity/fund performed?
  - Regarding a particular annuity or mutual fund product, how risky is it?
  - What fees would I have to pay if I invest in your product(s)?
- B. Review information on the carrier's website if available.
- C. Review annuity company ratings with insurance/credit risk rating service companies such as Moody's and Standard & Poor's.
  - [www.moodys.com](http://www.moodys.com)
  - [www.standardandpoors.com](http://www.standardandpoors.com)
- D. Review mutual fund ratings with companies such as Morningstar.
  - [www.morningstar.com](http://www.morningstar.com)