

# List of Approved ORP/TSA Companies & Agents

Retirement & Investments



# Supplementing Your Retirement

The Supplemental Retirement Program (SRP) is a voluntary 403(b) plan also offered by the ORP vendors. It is available to both TRS members and ORP participants, providing valuable flexibility and additional tax deferred funds for employees' personal retirement plans. This program is a supplemental tax deferred savings vehicle that receives no employer contributions and is subject to a maximum reduction regulated by Internal Revenue Codes. That amount is calculated using a Maximum Exclusion Allowance (MEA) formula that takes into account other tax deferred contributions such as those made under TRS or ORP. Employees who take advantage of this supplemental program are faced with many of the same decisions as ORP participants when selecting and monitoring companies and investments.

## Variable Annuity Life Insurance Company/VALIC

### VALIC

P O Box 15648  
Amarillo, Texas 79105  
[www.valic.com](http://www.valic.com)

### Michael Gifford

2929 Allen Parkway, RP-01  
Houston, Texas 77019  
Cell: (713) 724-3962  
eFax: (713) 574-2831  
Email: [michael.gifford@valic.com](mailto:michael.gifford@valic.com)

### Brian Orner

2929 Allen Parkway, RP-01  
Houston, Texas 77019  
Phone: (713) 298-9558  
Fax: (713) 831-6156  
Email: [brian.ornor@valic.com](mailto:brian.ornor@valic.com)

## Fidelity Investments

### FIDELITY

P O Box 770002  
Cincinnati, Ohio 45277-0089

Phone: (800) 343-0860 – New Accounts  
(800) 544-6666 – Existing Accounts  
(800) 835-5098

Fax: (877) 808-3432



# VOYA Retirement Insurance & Annuity Company / ING

## VOYA/ING

P O Box 990063  
Hartford, CT 06199-0063  
<http://voya.com>

## Shawn Quiggins

Phone: (713) 881-8727  
Phone: (832) 423-9631

Email: [shawnquiggins@voyafa.com](mailto:shawnquiggins@voyafa.com)



## Richard A. Becker

2717 Commercial Center Blvd., Suite E200  
Katy, Texas 77494  
Phone: (832) 374-0141

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[www.texasrp.net](http://www.texasrp.net)

## Angela Bryant

18635 IH 10, Suite 750  
Vidor, TX 77662  
Phone: (409) 422-4149  
Fax: (409) 750-7321

Email: [angela.bryant@voyafa.com](mailto:angela.bryant@voyafa.com)

# Life Insurance Company of the Southwest

## Patrick Purcell

14702 Banner Ridge Lane  
Humble, TX 77396

Phone: (972) 870-9164

Cell: (281) 458-0311

Email: [Patrick\\_purcell@sbcglobal.net](mailto:Patrick_purcell@sbcglobal.net)

## Christina Gears

5201 N. O'Connor Blvd.  
Suite 200

Irving, TX 75039

Phone: (972) 831-8866

Email: [christina@cmwfinancial.com](mailto:christina@cmwfinancial.com)

## Marcus Castille

10701 Corporate Drive  
Suite 130

Stafford, TX 77477

Phone: (800) 977-4091

(281) 491-2285

Cell: (409) 466-5948

Fax: (281) 491-1650

Email: [mcastille@momentum-financial.com](mailto:mcastille@momentum-financial.com)

## Eddie Stallworth, Jr.

8627 Hufsmith Rd.

Suite 1333

Phone: (832) 779-7374

Cell: (281) 781-4027

Email: [eddie.pfsg@outlook.com](mailto:eddie.pfsg@outlook.com)





# Teachers Insurance and Annuity Association (TIAA-CREF)

6400 Fannin, Suite 2450  
Houston, TX 77030  
Phone: (832) 681-7400  
(866) 842-2951  
(832) 675-0068

Trey Brown  
Carine Smith  
Stephen Janak  
Vincent Branch



# MetLife Resources Metropolitan Life Insurance Company

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5400 LBJ Freeway, Suite 1285  
Dallas, TX 75240  
Phone: (800) 236-8489

### Vincent Faraci

2615 Calder, Suite 420  
Beaumont, TX 77702  
Phone: (409) 832-6344  
(409) 835-3468  
Fax: (409) 832-0911

### Laura Heath

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Phone: (800) 236-8489  
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# ASpire Financial Services

## ASpire Financial Services

4010 Boy Scout Blvd., Suite 500  
Tampa, FL 33607  
Phone: (866) 634-5873

## Bruce Stracener

4 Arcadiana Court  
Beaumont, TX 77706  
Phone: (409) 832-7308  
Fax: (409) 347-1254  
Email: [BStracener@Sagepointadvisors.com](mailto:BStracener@Sagepointadvisors.com)

## John D. Tucker

6250 Judy Lane, Ste. 101  
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## Bo Crawford

985 IH-10 North, Suite 101  
Beaumont, TX 77706  
Phone: (409) 892-8017  
Fax: (409) 892-7839

## Timothy A. Holloway

Inside Mid South Bank  
555 N. Dowlen Rd.  
Beaumont, TX 77706  
Phone: (409) 895-0111  
Cell: (318) 542-9690  
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## Cindy Mims

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## David Heinz

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Fax: (888) 687-0911  
Fax: (409) 892-0507  
Email: [david.heinz@sunbeltsecurities.com](mailto:david.heinz@sunbeltsecurities.com)

## Tina Lombardo

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## Zach Egbert

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[www.texasrp.net](http://www.texasrp.net)



# Lincoln Financial Group



## Ellen Mallay

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Phone: (713) 552-7909

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## Bob McKnight

1407 N. University, Suite A  
Nacogdoches, TX 75961

Phone: (936) 564-2307

Fax: (936) 564-3016

Email: [westmcknight@suddenlinkmail.com](mailto:westmcknight@suddenlinkmail.com)

# USAA Life Insurance Company

## USAA Life Insurance Company

9800 Fredericksburg Road

San Antonio, TX 78288

Phone: (800) 531-8292

Fax: (800) 414-7526

Email: [www.specann@usaa.com](mailto:www.specann@usaa.com)

- Debbie Rau
- Michael Douglass
- Donald Carol



# National Life Group



## **Paulette Peoples**

Phone: (281) 575-9264

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## **Kimberly Williams**

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