

Canyons School District

9361 S 300 E Sandy, UT 84070 (801)826-5368

Tax Shelter Annuity Companies - updated 4/19/2021

401(k) & 457 Providers

Utah State Retirement (URS)
PO Box 1590
Salt Lake City, UT 84110-1590
(801) 366-7720
(801) 366-7445 Fax

THIRD PARTY ADMINISTRATOR:

US OMNI TSA **888-796-3786 opt. 4**

Active 403 (b) Companies & Agents

American Century Investments	unassigned
	(816) 531-5575
Ameriprise Financial	TSA04
Jeremy Leavitt	(801) 748-1733
8915 S 700 E Ste 104 Sandy, UT 84070-2421	jeremy.leavitt@ampf.com
Equitable (AXA) * Also Roth	TSA01
Jared Henderson	(801) 733-2417
2825 E Cottonwood Pkwy, Ste 430 Salt Lake City, UT 84121	cell (801) 673-7271 jared.henderson@axa.com
Brandon Patrick	(801) 303-5700
375 S 300 W 2nd Floor Salt Lake City, UT 841021	brandon@bp-retirement.com
Grant Stewart	619-990-2990
2825 E Cottonwood Pkwy, Ste 430 Salt Lake City, UT 84121	Grant.stewart@axa-advisors.com
Fidelity	TSA12
Kade McKell - Divergent Wealth Adv	(385) 237-4000
489 W South Jordan Parkway, Suite 3 South Jordan, UT 84095	Cell (3851) 237-5712 kade.mckell@divergentwealth.com
Penserv (First Investors)	
	(503)-296-7676
GALIC Disbursing	TSA02
Drew Hill	(801) 499-4523
610 N 900 W #100 Kaysville, UT 84037	(801) 544-8993 office dhill@planmembersec.com
Nicolas Snarr	(801) 661-7115
160 West Canyon Crest Rd Alpine, UT 84004	nicolassnarr@appreciationfinancial.com
Horace Mann	TSA03
Preston Day	(801) 910-9190
2785 W 9000 S #122 West Jordan, UT 84084	(385) 429-7872c Preston.Day@horacemann.com
Mario Pia & Jamee Pia	(801) 347-7880
2785 W 9000 S #122 West Jordan, UT 84084	(801) 566-2313c mario.pia@horacemann.com
Met Life	TSA11
Francine Szakacs	(908) 253-1739
501 U.S Hwy 22 Bridgewater, NJ 08807	fszakacs@metlife.com

National Life Group (LSW) *Also Roth	TSA15
Gregory Wade Brown (Wade)	(801) 803-8637
160 West Canyon Crest Rd Alpine, UT 84004	gbrown@appreciationfinancial.com
Nicolas Snarr	(801) 661-7115
160 West Canyon Crest Rd Alpine, UT 84004	nicolassnarr@appreciationfinancial.com
Andrew Shirley (Drew)	801-319-0705
160 West Canyon Crest Rd Alpine, UT 84004	ashirley@appreciationfinancial.com
Oppenheimer Funds	TSA08
	(800) 525-7048
Security Benefit Life *Also Roth	TSA10
Mark Miller	(801) 446-2520
2838 W 9760 S South Jordan, UT 84095	markmiller@keystonefinancialedge.com
Megan Palazzo	(801) 661-7115
222- E Murray Hollady Rd #185 SLC UT 84117	megazzo185@gmail.com
Brian Stoker	(801) 906-1331
7396 S Union Park Ave, Ste 101 Salt Lake City, UT 84047	brian@westridgeadvisors.com
T Rowe Price	unassigned
	(800) 922-9945
Newport Trust Company (Vanguard)	TSA15
Variable Annuity Life	TSA09
(Arthur) Steve Leo	(801) 521-9922
420 E South Temple Suite 430 Salt Lake City, UT 84111	steve.leo@valic.com
VOYA	TSA07
Quinn Campbell	(385) 458-9080
6695 S 1300 E Cottonwood Heights, UT 84121	(801) 458-9080 c qcampbell@rsgutah.com
Nathan Jackson	(385)-800-2414
6695 S 1300 E Cottonwood Heights, UT 84121	(801) 458-9080 c qcampbell@rsgutah.com
Ross Wamsley	
5237 Saddle Creek Circle West Jordan, UT 84081	rosswamsley@voyafa.com