

## HCPS Tax Shelter Accounts (TSA) Program

TSA Company	Representative's		Phone	Cell	Address	E-mail Address
	Last Name	First Name				
<b>AXA Advisors</b>	<b>Brown</b>	<b>Chelsea</b>	813-282-9088	813-235-3281	4890 W. Kennedy Blvd., Ste 800, Tampa, FL 33609	<a href="mailto:chelsea.brown@axa-advisors.com">chelsea.brown@axa-advisors.com</a>
	Angle	Scott	813-282-9088	727-967-4615	4890 W. Kennedy Blvd., Ste 800, Tampa, FL 33609	<a href="mailto:scott.angle@axa-advisors.com">scott.angle@axa-advisors.com</a>
	Gold	Brenda	813-282-9088	813-625-4290	4890 W. Kennedy Blvd., Ste 800, Tampa, FL 33609	<a href="mailto:brenda.gold@axa-advisors.com">brenda.gold@axa-advisors.com</a>
	Lau	Ryan	813-282-9088	813-727-6788	4890 W. Kennedy Blvd., Ste 800, Tampa, FL 33609	<a href="mailto:ryan.lau@axa-advisors.com">ryan.lau@axa-advisors.com</a>
	Prescott	Ben	813-282-9088	813-777-9284	4890 W. Kennedy Blvd., Ste 800, Tampa, FL 33609	<a href="mailto:benjamin.prescott@axa-advisors.com">benjamin.prescott@axa-advisors.com</a>
	Sardegna	Jack	813-282-9088	813-598-4138	4890 W. Kennedy Blvd., Ste 800, Tampa, FL 33609	<a href="mailto:jack.sardegna@axa-advisors.com">jack.sardegna@axa-advisors.com</a>
	Smith	Derek	813-282-9088	941-313-4956	4890 W. Kennedy Blvd., Ste 800, Tampa, FL 33609	<a href="mailto:derek.smith@axa-advisors.com">derek.smith@axa-advisors.com</a>
	Vente	David	813-466-3169	813-833-9252	4890 W. Kennedy Blvd., Ste 800, Tampa, FL 33609	<a href="mailto:david.vente@axa-advisors.com">david.vente@axa-advisors.com</a>
<b>Horace Mann</b>	<b>Cucchi</b>	<b>Gary</b>	813-600-3268	813-220-0350	26809 Tanic Dr., Wesley Chapel, FL 33544	<a href="mailto:gary.cucchi@horacemann.com">gary.cucchi@horacemann.com</a>
	Crager	John	727-576-5555	727-647-7161	3009 W. Aquilla Street, Tampa, FL 33629	<a href="mailto:john.crager@horacemann.com">john.crager@horacemann.com</a>
	Guillen	Steve	813-413-0617	813-453-0579	13902 N. Dale Mabry #211, Tampa, FL 33618	<a href="mailto:Steve.Guillen@horacemann.com">Steve.Guillen@horacemann.com</a>
	Hogan	Todd	813-839-0800	813-508-3224	3412 W Bay to Bay Blvd. Ste K, Tampa, FL 33629	<a href="mailto:todd.hogan@horacemann.com">todd.hogan@horacemann.com</a>
	Humphrey	Keith	813-654-6266		4316 New River Hills Pkwy, Ste #108, Valrico, FL 33596	<a href="mailto:keith.humphrey@horacemann.com">keith.humphrey@horacemann.com</a>
	Izquierdo	Susan	813-600-3268	813-438-6093	26809 Tanic Dr., Wesley Chapel, FL 33544	<a href="mailto:susan.izquierdo@horacemann.com">susan.izquierdo@horacemann.com</a>
	Jackson	Jerry	813-600-3268		26809 Tanic Dr., Wesley Chapel, FL 33544	<a href="mailto:jerry.jackson@horacemann.com">jerry.jackson@horacemann.com</a>
	Matson	Curtis	813-600-3268		26809 Tanic Dr., Wesley Chapel, FL 33544	<a href="mailto:cutis.matson@horacemann.com">cutis.matson@horacemann.com</a>
	Rottenberger	Reuben	813-600-3268		26809 Tanic Dr., Wesley Chapel, FL 33544	<a href="mailto:Reuben.Rottenberger@horacemann.com">Reuben.Rottenberger@horacemann.com</a>
	Sellick	Charley	813-600-3268	941-749-3132	26809 Tanic Dr., Wesley Chapel, FL 33544	<a href="mailto:Charlie.Sellick@horacemann.com">Charlie.Sellick@horacemann.com</a>
	Smith	Michael	813-600-3268	813-395-4045	26809 Tanic Dr., Wesley Chapel, FL 33544	<a href="mailto:michael.smith@horacemann.com">michael.smith@horacemann.com</a>
	Solate	Yomi	813-600-3268	813-453-0449	26809 Tanic Dr., Wesley Chapel, FL 33544	<a href="mailto:yomi.solate@horacemann.com">yomi.solate@horacemann.com</a>
	Tijerino	Nery	813-600-3268	813-924-6564	26809 Tanic Dr., Wesley Chapel, FL 33544	<a href="mailto:nery.tijerino@horacemann.com">nery.tijerino@horacemann.com</a>
<b>Lincoln Invest.</b>	<b>Smith</b>	<b>Bret</b>	813-269-7100		16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:bsmith@westcoastfinancial.com">bsmith@westcoastfinancial.com</a>
	Adwell	Don	813-269-7100	813-695-3960	16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:wadwell@westcoastfinancial.com">wadwell@westcoastfinancial.com</a>
	Capuano	Rob	813-837-8600	813-505-1799	16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:rcapuano@lincolninvestment.com">rcapuano@lincolninvestment.com</a>
	Donaldson	Michael	813-269-7100	813-390-6561	16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:mdonaldson@lincolninvestment.com">mdonaldson@lincolninvestment.com</a>
	Hoke	John	813-269-7100	813-241-5549	16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:jhoke@westcoastfinancial.com">jhoke@westcoastfinancial.com</a>
	Isaly	Christian	813-269-7100	727-505-3689	16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:cisaly@westcoastfinancial.com">cisaly@westcoastfinancial.com</a>
	Lott	Brian	813-269-7100	727-992-9447	16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:blott@westcoastfinancial.com">blott@westcoastfinancial.com</a>
	Lyle	Cheryl	813-269-7100	561-573-4913	3631 Henderson Blvd. Tampa, FL 33609	<a href="mailto:clyle@lincolninvestmen.com">clyle@lincolninvestmen.com</a>
	Odor	Marsha	813-269-7100	813-263-7611	16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:modor@lincolninvestment.com">modor@lincolninvestment.com</a>
	Sharpe	Richard	813-269-7100	813-480-5487	16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:rsharpe@westcoastfinancial.com">rsharpe@westcoastfinancial.com</a>
	Smith	Jesse	813-269-7100		16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:jsmith@westcoastfinancial.com">jsmith@westcoastfinancial.com</a>
	<b>Smith</b>	<b>Rick</b>	813-269-7100		16241 N. Florida Ave., Lutz, FL 33549	<a href="mailto:rsmith@westcoastfinancial.com">rsmith@westcoastfinancial.com</a>

## HCPS Tax Shelter Accounts (TSA) Program

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	Last Name	First Name				
<b>Suncoast CU</b>	<b>Echols</b>	<b>Roy</b>	813-246-5211	x86727	4014 Gunn Hwy., Ste 140, Tampa, FL 33618	<a href="mailto:roy.echols@suncoastcreditunion.com">roy.echols@suncoastcreditunion.com</a>
403b	Burt	Doug	813-246-5211	x86731	4014 Gunn Hwy., Ste 140, Tampa, FL 33618	<a href="mailto:doug.burt@suncoastcreditunion.com">doug.burt@suncoastcreditunion.com</a>
403b	Hood	Hope	813-246-5211	x86734	4014 Gunn Hwy., Ste 140, Tampa, FL 33618	<a href="mailto:hope.hood@suncoastcreditunion.com">hope.hood@suncoastcreditunion.com</a>
403b	Johnson	Madelon	813-246-5211	x 86712	4014 Gunn Hwy, Ste 140, Tampa, FL 33618	<a href="mailto:madelon.johnson@suncoastcreditunion.com">madelon.johnson@suncoastcreditunion.com</a>
403b	Lanning	Ryan	813-246-5211	x86753	4014 Gunn Hwy., Ste 140, Tampa, FL 33618	<a href="mailto:ryan.lanning@suncoastcreditunion.com">ryan.lanning@suncoastcreditunion.com</a>
403b	Lapenna	David	813-246-5211	x86720	4014 Gunn Hwy., Ste 140, Tampa, FL 33618	<a href="mailto:david.lapenna@suncoastcreditunion.com">david.lapenna@suncoastcreditunion.com</a>
403b	Letchworth	Maggie	813-246-5211	x86726	4014 Gunn Hwy., Ste 140, Tampa, FL 33618	<a href="mailto:maggie.letchworth@suncoastcreditunion.com">maggie.letchworth@suncoastcreditunion.com</a>
403b	Loeffler	Ray	813-246-5211	x86717	4014 Gunn Hwy., Ste 140, Tampa, FL 33618	<a href="mailto:ray.loeffler@suncoastcreditunion.com">ray.loeffler@suncoastcreditunion.com</a>
403b	Millhone	Kenneth	813-246-5211	x86740	4014 Gunn Hwy., Ste 140, Tampa, FL 33618	<a href="mailto:ken.millhone@suncoastcreditunion.com">ken.millhone@suncoastcreditunion.com</a>
403b	Morbach	Steven	813-246-5211		4014 Gunn Hwy, Ste 140, Tampa, FL 33618	<a href="mailto:steven.morbach@suncoastcreditunion.com">steven.morbach@suncoastcreditunion.com</a>
403b	Rojas	Armando	813-246-5211	x86724	4014 Gunn Hwy., Ste 140, Tampa, FL 33618	<a href="mailto:amando.rojas@suncoastcreditunion.com">amando.rojas@suncoastcreditunion.com</a>
403b	Toms	Russell	813-246-5211	x86749	4014 Gunn Hwy., Ste 140, Tampa, FL 33618	<a href="mailto:russell.toms@suncoastcreditunion.com">russell.toms@suncoastcreditunion.com</a>
457	Boggs	Brenda	813-621-7511	x88942	6801 E. Hillsborough Ave., Tampa, FL 33610	<a href="mailto:brenda.boggs@suncoastcreditunion.com">brenda.boggs@suncoastcreditunion.com</a>
457	Brock	Katie	813-621-7511	x88944	6801 E. Hillsborough Ave., Tampa, FL 33610	<a href="mailto:katie.brock@suncoastcreditunion.com">katie.brock@suncoastcreditunion.com</a>
457	Cahoun	Linda	813-621-7511	x88740	6801 E. Hillsborough Ave., Tampa, FL 33610	<a href="mailto:linda.cahoun@suncoastcreditunion.com">linda.cahoun@suncoastcreditunion.com</a>
457	Chambers	Rebecca	813-621-7511	x88945	6801 E. Hillsborough Ave., Tampa, FL 33610	<a href="mailto:rebecca.chambers@suncoastcreditunion.com">rebecca.chambers@suncoastcreditunion.com</a>
457	Miller	Yvonne	813-621-7511	x88830	6801 E. Hillsborough Ave., Tampa, FL 33610	<a href="mailto:yvonne.miller@suncoastcreditunion.com">yvonne.miller@suncoastcreditunion.com</a>
457	Minnich	Sherry	813-621-7511	x88381	6801 E. Hillsborough Ave., Tampa, FL 33610	<a href="mailto:sherry.minnich@suncoastcreditunion.com">sherry.minnich@suncoastcreditunion.com</a>
457	Schaef	Nicholas	813-621-7511	x88381	6801 E. Hillsborough Ave., Tampa, FL 33610	<a href="mailto:schaaf.nicholas@suncoastcreditunion.com">schaaf.nicholas@suncoastcreditunion.com</a>
<b>VALIC</b>	<b>Brown</b>	<b>Chris</b>	813-269-3362	813-712-0938	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:chris.brown@valic.com">chris.brown@valic.com</a>
	Doers	Jaime	813269-3362	813-504-3445	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:jaime.doers@valic.com">jaime.doers@valic.com</a>
	Gelin	Bruce	813-269-3362	813-380-2310	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:bruce.gelin@valic.com">bruce.gelin@valic.com</a>
	Jones	Jeremy	813-269-3362	813-382-8271	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:jeremy.jones@valic.com">jeremy.jones@valic.com</a>
	Maniaci	Eric	813-269-2262	813-775-5833	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:eric.maniaci@valic.com">eric.maniaci@valic.com</a>
	Moisa	Carlos	813-269-3362	813-614-3473	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:carlos.moisa@valic.com">carlos.moisa@valic.com</a>
	Ramos	Randy	813-269-3362	813-545-0847	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:randy.ramos@valic.com">randy.ramos@valic.com</a>
	Roberts	Matt	813-269-3362	813-415-6188	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:matt.roberts@valic.com">matt.roberts@valic.com</a>
	Salvato	Kristina	813-269-3362	813-313-9952	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:kristina.salvato@valic.com">kristina.salvato@valic.com</a>
	Swearingen	Eric	813-269-3362	727-433-6414	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:eric.swearingen@valic.com">eric.swearingen@valic.com</a>
	Vila	Jonathan	813-269-3362	813-610-5452	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:jonathan.vila@valic.com">jonathan.vila@valic.com</a>
	Voges	Kent	813-269-3362	813-629-1129	4300 W. Cypress, Ste 1000, Tampa, FL 33607	<a href="mailto:kent.voges@valic.com">kent.voges@valic.com</a>

## HCPS Tax Shelter Accounts (TSA) Program

TSA Company	Representative's		Phone	Cell	Address	<a href="#">E-mail Address</a>
	Last Name	First Name				

While the School Board permits tax deferred salary deductions for these approved companies, it does not recommend or endorse any of these companies. The employee is solely responsible for determining if this program meets his/her needs and for selecting a company. The following is an excerpt from Florida Statutes, chapter 112.21(3): "The purchase of such tax shelter, annuity or other investment qualified under the United States Internal Revenue Code and not prohibited under the laws of this state for an employee shall impose no liability or responsibility whatsoever on the employing agency except to show that the payments have been remitted for which deducted."

Updated 3/3/2017