

Approved ORP/TDA Vendors and Representatives for Sul Ross State University

Vendor	Plan Type	Representative	City	Phone	E-mail Address	Web Address
American Funds	ORP & TDA					www.americanfunds.com
		Jim Cauble	Meadowlakes, TX	830-693-0333	jamescauble@GWNSecurities.com	
		Jerry Williams	Lantana, TX	800-330-0333	jwilliams@legendgroup.com	
		Jim Pogue	Alpine, TX	432-837-3058	jim.pogue@edwardjones.com	
		Aliston Hinojos	Alpine, TX	432-837-3058	aliston.hinojos@edwardjones.com	
		Gail O'Neill	Alpine, TX	432-837-9540	goneill@wundernet.com	
		Erika Gonzalez	Del Rio, TX	830-775-3074	erika.gonzalez@edwardjones.com	
Fidelity Investments	ORP & TDA		Dallas, TX	800-544-6666		www.fidelity.com
Lincoln Financial Group	ORP & TDA	Charles Davenport	Austin, TX	866-248-6391	charles.davenport@LFG.com	www.LFG.com
Voya	ORP & TDA					www.ing-usa.com
		G. Frank Rogers	Austin, TX	800-573-0944	gilman.rogers@ingfa.com	
		Jamie Phillips	Midland, TX	432-520-8335	jamie.phillips@ingfa.com	
		Gail O'Neill	Alpine, TX	432-837-9540	goneill@wundernet.com	
TIAA	ORP & TDA		New York, NY	800-842-2733		www.tiaacref.org
AIG Valic	ORP & TDA					www.aigretirement.com
		Jim Cauble	Meadow Lake, TX	830-693-0333	jamescauble@GWNSecurities.com	
		Gail O'Neill	Alpine, TX	432-837-9540	goneill@wundernet.com	
		Jerry Williams	Lantana, TX	800-330-0333	jwilliams@legendgroup.com	
		Kerry Norwood	Odessa, TX	432-770-5857	kerry.norwood@valic.com	
		Erika Gonzalez	Del Rio, TX	830-775-3074	erika.gonzalez@edwardjones.com	
USAA	ORP & TDA	Request a 403B	Representative	1-800-771-9960		www.usaa.com

Last Updated

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