

Winslow Township Board of Education

Tax Shelters/Disability & Life Insurance

Tax Shelters

Amerprise / River Source

Contact: Stephanie Tocco
(856) 741-8000 ext. 367
stephanie.m.tocco@ampf.com

Franklin Templeton

Contact: James McMonigle
(856) 228-8588 -Office
(856) 905-8963 - Cell
jmcmonigle@wealthmanage.net

MetLife

No Longer Authorized to Start New Plans
Established Plans Contact MetLife
(833) 642-1008
(800) 856-7772

Lincoln Investment

Contacts: Harold Hill
(856) 596-4830 ext.2633
Rian Steinbiss
(856) 596-4830 ext. 2406
Joan Glenn
(856) 566-8330

AXA Equitable Access

(800) 628-6673

Fidelity Investments

Contact: Aaron Skloff
(908) 531-6422

Primerica (403b & After Tax IRA's)

Contact: Rob Williams
(609) 261-3324
(800) 544-5445
r.williams.59555@primerica.com

CitiStreet

Existing CitiStreet Clients Should Contact
(800) 560-5001

Midland National

Contacts: Joyce Shorts
Troy Shorts
(856) 642-4074
jshorts@shortsandassociates.com
tshorts@shortsandassociates.com

Vanguard

(800) 662-2739

Lincoln Investment

(formerly The Legend Group) (formerly Tr

Contacts: Patricia Jansen
(732) 874-5942
Clark Tatum
(609) 647-4864
(888) 883-6710
Retirement Services: (215) 881

Disability & Life Insurance

Prudential

(800) 704-1365

AFLAC

Contact: Maryann Meyers
(609) 602-2700
maryann_meyers@us.aflac.com

New York Life - Life Insurance

Contacts: Dan Giusti
(609) 412-4165
Mike Valentine
(215) 933-8506

Colonial Life

Contacts: Brad Biel
(973) 537-2800
brad.biel@coloniallifesales.com
Joshua Grubman
(609) 405-0775

MGM / The Hartford

(Lincoln Investment/ Seely Agency) (form

Contact: Tammy Potts
(856) 596-4830 ext. 6038 or (8
tpotts@lincolninvestment.com

Phifer (American General)

Contact: Hugh Phifer
(856) 853-8400
phiferfinancial@comcast.net