

Retirement Plans Regional Sales Teams

July 2018
For Advisor/TPA Use Only

| Territory Details | Retirement Plan Consultant | Internal Retirement Plan Consultant |
|--|---------------------------------|-------------------------------------|
| California: East Bay, North Bay, Central Valley except Fresno; Nevada (except Las Vegas) | Kelly Amato 415.264.7682 | Kirsten Schmieding 971.321.8777 |
| California: San Francisco, Peninsula, Monterey, South Bay, Fresno | Marc Olson 415.265.3516 | Max Fonts 971.321.6686 |
| California: Los Angeles, Kern and Ventura Counties, Santa Barbara, San Luis Obispo | Scott Harrison 818.277.7973 | Nicole Bryson 971.321.3611 |
| California: Orange, San Diego, San Bernardino and Riverside Counties; Arizona; Nevada: Las Vegas | Joel Mee 503.789.2627 | Chris Horne 971.321.2659 |
| Oregon; Alaska | Chris Wolfe 602.574.8513 | N/A |
| Washington; Idaho; Montana | Travis Fossati 503.317.4856 | Kevin MacMillan 971.321.6557 |
| Colorado; New Mexico; Utah; Wyoming | Brad Weber 623.202.7580 | Nicole Bryson 971.321.3611 |
| Arkansas; Oklahoma; Texas: Dallas, Fort Worth, El Paso, Abilene, Amarillo, Lubbock, Midland | Jeff Belton 214.966.2094 | Alex Kroner 971.321.6720 |
| Texas: Houston, San Antonio, Austin, Waco, Beaumont, Corpus Christi | Randy Cater 832.524.3060 | Michael Kennedy 832.427.9979 |
| Illinois: Southern tip; Iowa (except Northeast): Des Moines, Quad Cities; Kansas; Missouri; Nebraska | Josh Burnett 913.216.0639 | Kirsten Schmieding 971.321.8777 |
| Florida: South of I-10 | Brian Armstrong 813.878.0267 | Max Fonts 971.321.6686 |
| Louisiana; Mississippi; Alabama: Mobile and Gulf Coast to Jacksonville, Florida | Daniel Marshall 985.778.6654 | Alex Kroner 971.321.6720 |
| North and South Dakota; Iowa (Northeast only); Minnesota; Wisconsin: western corridor bordering Minnesota and Iowa | Rick Merwin 612.360.1156 | Kevin MacMillan 971.321.6557 |
| Ohio: Central and Southern; Indiana: Southern; Kentucky | Kate Tubesing 513.814.7682 | Henoch Tezera 971.321.3337 |
| North Carolina; South Carolina; Tennessee; Georgia; Alabama (except Mobile and Gulf Coast) | Chris Weekley 770.865.6972 | Henoch Tezera 971.321.3337 |
| Illinois: Chicago and northern suburbs; Wisconsin: Milwaukee, Green Bay, Appleton and surrounding areas | Mike Flahaven 847.217.2725 | Matt Kehl 971.321.4755 |
| Illinois: Western and southern Chicago suburbs; Indiana: Northern (including Fort Wayne); Michigan: Southwest corner (including Kalamazoo); Wisconsin: Madison, Janesville and surrounding areas | Chris Hale 224.422.7052 | Matt Kehl 971.321.4755 |
| New York: Upstate west; Ohio: Northern; West Virginia; Pennsylvania: Western | Brian Forneris 440.344.8867 | Miriam Carreno 971.321.2613 |
| Michigan (except southwest corner and Kalamazoo) | Matt Daniels 248.260.8501 | Miriam Carreno 971.321.2613 |
| Connecticut; Massachusetts; Maine; New Hampshire; New York: Upstate east; Rhode Island; Vermont | Seth Marsters 781.756.3424 | Katherine Bass 971.321.0774 |
| New Jersey; Pennsylvania: Eastern; Virginia; Maryland; Washington DC; Delaware; New York: Long Island; Manhattan | Bob Burke 401.617.5855 | Katherine Bass 971.321.0774 |