

MISD Approved 403(b) and 457(b) Provider Listing

	Provider Information	Products ¹ Offered	Plans Offered
Provider:	GLP Financial		
Contact:	Mike McEvilly www.glpfinancialgroup.com		403(b)
Address:	33335 Grand River Ave	GLP Investment Services	457(b)
City/State:	Farmington, MI 48336		Roth 403(b)
Phone:	(248) 489-0101		
Provider:	Raymond James & Associates, Inc.		
Contact:	Jim Marchand www.raymondjames.com	Aspire 403b	403(b)
Address:	19176 Hall Rd, Suite 100		
City/State:	Clinton Township, MI 48038		
Phone:	(586) 221-4957		
Provider:	Consolidated Financial Co.		
Contact:	Brian Hamlin www.cfcwealthmanagement.com	Lincoln Investments	403(b)
Address:	28411 Northwestern Hwy, Suite 950		457(b)
City/State:	Southfield, MI 48034		
Phone:	(248) 351-6000		
Provider:	Equitable Advisors		
Contact:	William H. Roberts and Joseph Sarnecky Antonio Kavouriou and David Rossetter www.greatlakes.equitableadvisors.com	Equitable Advisors	403(b)
Address:	201 W. Big Beaver Rd., Suite 300		457(b)
City/State:	Troy, MI 48084		
Phone:	(248) 641-2650		
Provider:	BDL Wealth Management		
Contact:	Cleaton M. Lindsey III www.bdlwealthmanagement.com	LPL Financial	403(b)
Address:	3155 W. Big Beaver Rd, Suite 103		
City/State:	Troy, MI 48084		
Phone:	(248) 643-4965		
Provider:	M3 Investment Services		
Contact:	Robert Bernhardt John Cruse and Brandon Lopez www.M3Advisor.com	Lincoln Investments	403(b)
Address:	990 North Main Street		457(b)
City/State:	Royal Oak, MI 48067		Roth 403(b)
Phone:	(248) 543-3400		
Provider:	TIAA CREF		
Contact:	Ramiro Portillo-Villalobos www.tiaa.org	TIAA-CREF	403(b)
Address:	1670 Broadway Suite 2200		457(b)
City/State:	Denver, CO 80202		
Phone:	(720) 572-6245		
Provider:	Eschels Financial Group, Inc.		
Contact:	Randy Eschels www.efg-ida.com	Concourse Financial Group Securities Inc	403(b)
Address:	555 S. Old Woodward Ave, Suite #612		457(b)
City/State:	Birmingham, MI 48009	(Fka ProEquities)	
Phone:	(248) 644-1144		
Provider:	Fidelity Retirement Services		
Contact:	www.fidelity.com	Fidelity Direct	403(b)
Phone:	(800) 835-5097		457(b)
Provider:	Vanguard National Trust Company		
Contact:	www.vanguard.com	Vanguard Funds	403(b)
Phone:	(800) 523-1188		
Provider:	State of Michigan 457 Plan		
Contact:	https://stateofmi.voya.com	Voya Financial	457(b)
Phone:	(800) 748-6128		

¹ This is not an exhaustive list of products. Contact provider for more information.

The providers listed above have been selected by employees of the Macomb ISD and have satisfied and maintained minimum employee participation requirements. Participating employees must select from one of the approved providers above. Selecting identical or similar products from providers not listed above will not be accepted.