



Lakewood Board of Education

200 Ramsey Avenue, Lakewood, NJ 08701

Main Office: (732) 364-2400 Fax: (732) 905-3687

Laura A. Winters, Superintendent of Schools

Contact Listing for Tax Shelters

All transactions for tax shelters are processed by our Third Party Administrator (TPA), OMNI.

Contact information for our approved tax shelters and OMNI are below:

<u>Company</u>	<u>Contact</u>	<u>Phone #</u>
Ameriprise	Matthew Fitzgerald	856-797-0200x 118
AXA Equitable	John Cicala – jcicala@pwsgroupnj.com	732-606-8400
	Richard Johansen	732-606-8400
Corebridge formerly AIG/Valic	Brett Young	908-470-4114
Lincoln Investments	Joseph Johnston - jjohnston@lincolninvestment.com	856-596-4830 x2213
Mass Mutual	Beth Ulrich	732-677-7012
Met Life	John Costello - johncostello@financialguide.com	856-802-0980
Security Benefit/NEA Retirement	Gary Brown – gary@patriotfinancialgroup.net	609-351-5033
Siracusa	Joe Ruffenach – jruffenach@gwnsecurities.com	609-653-0181
VanGuard	Customer Service	800-523-1188

Third Party Administrator OMNI:

Customer Service

P – 877-544-6664

F – 585-360-0501

www.omni403b.com