



# Financial Services

Phone Directory	
136	Al Frasca
146	Andrew Angerbauer
151	Amanda Jackson
111	Anna Larson
204	Anthony Inkley
139	Ashley Hardy
113	Avery Ballantyne
110	Bart Wagstaff
144	Ben Coburn
125	Bradyn Haderlie
134	Brock Andersen
126	Carson Strong
101	Cassie Myers
130	Cristian Avila
122	Cristian Haymes
128	Danielle Lewis
205	DJ Nelson
132	Hayley Pett
129	Jackie Smith
201	Jane Clayton
105	Jayson McGinnis
117	Joe Kent
109	Josh Scott
141	Kaitlin Collins
147	Katie Brinkerhoff
100	Kelsey Dent
202	Kim Solomon
143	Kyle Cuvelier
114	Laura Hadley
108	Lauren Jacobson
206	Lijeein Jassim
140	Liz Guerrero
135	Mallhory Jones
118	Melanie Tining
104	Michael Littledike
142	Milena Overstreet
148	Nate Christensen
133	Rich Gurr
119	Rinar Erickson
150	Robby Howe
102	Rylie Reynolds
127	Scott Watko
145	Sean Jones
120	Shannon Lundberg
203	Sydney Davis
124	Tanner Smith
149	Tia Hinderliter
123	Tim Gottfredson
137	Todd Storrs
115	Tyler Schenk
103	Tyler Williamson
121	Tyson Long
107	Tyson Williamson
131	Walker Stahle
106	Zacc Call
116	Zach Geertsen
138	Zach Newman

Capita Phone List		
Company	Number	Notes
Allianz	800-950-7372	Option 3 #6771
MassMutual	888-221-1234	0136575, 0175059
Great American	800-854-3649	M: SP41111
Schwab	866-468-7562	IG 17 Team
LDS Church Donations	801-240-2554	
Greg Lyle	801-663-6406	
Senior Benefits	801-523-6081	
Trade Desk	208-497-0693	
Genworth	800-221-9501	Mike's Rep Code: TGS1M
Athene	888-266-8489	
Fidelity West Service	800-523-7166	Code 88236

Townsquare Info	
Tradedesk Phone	385 375-8881
Tradedesk Email	<a href="mailto:tradedesk@orion.com">tradedesk@orion.com</a>
Townsquare Phone	385-375-8650
Townsquare Service Email	<a href="mailto:solutions@townsquarecapital.com">solutions@townsquarecapital.com</a>

Charles Schwab Addresses	
<b>OVERNIGHT MAIL</b>	
1945 Northwestern Drive El Paso, Texas 79912	
<b>REGULAR MAIL</b>	
P.O. Box 982603 El Paso, Texas 79998	

Remote Staff Cell Numbers	
Lindsay Hadley	801-889-9875
Shayla Lamb	801-616-7023

Firm Fidelity G Numbers	
Transaction Base Pricing	G39093861
Capita Master/Super	G38506541
Townsquare G Number	G30795850

Rep Codes	Capita	Fidelity G Number	Schwab Master Account	APEX	Allianz
Michael Littledike	ML	G39162584	0818-0545		806103515
Tyler Williamson	TW	G39162600	0839-3463		806103547
Zaccary Call	ZC	G39162590	0822-5943		
Bart Wagstaff	BW	G39162586	0819-0760		806103658
Jayson McGinnis	JM	G39162594	0815-3709		806103696
Zach Geertsen	ZG	G39219651	0827-4879		806103773
Rinar Erickson	RE	G39162583	0843-4823		806103771
Tyson Long	TL	G39219650	0824-8277		806103776
Tim Gottfredson	TG	G39162596	0814-5308		806103768
Laura Hadley	LH	G39162593	0820-4819		806103774
Rich Gurr	RG	G39162591	0838-6845		
Joe Kent	JK	G39162599	0836-7126		806103783
Tyler Schenk	TS	G39162598	0830-2985		806103778
Joshua Scott	JS	G39162585	0838-5080		806103772
Tanner Smith	TA	G39162597	0823-7230		806103784
Brock Andersen	BA	G39162587	0814-8023		
Alison Frasca	AF	G39162589	0843-7858		
Andrew Angerbauer	AA	G39162592	0878-8281		
Katie Brinkerhoff	KB	G39162588	0836-9857		
Nate Christensen	NC	G39162595	0801-5695		
PCRA Accounts			0830-3716		

Advisor's Manager Guide		
Zacc	Scott	Todd
Bart	Zach	Tyler
Jayson	Tim	Joe
Tyson	Laura	Brock
Tyson W	Josh	Andrew
	Tanner	Katie
	Tyler S	Nate
	Alison	Rich
		Rinar

Advisor Coverage	
Blood Orange: Rinar, Tyson L., Tyler W., Brock	(Carson first coverage for RE/TL)
Deep Blue: Tim, Zach G., Laura, Rich	(Danielle first coverage for TG/ZG) (Tia first coverage for LH/RG)
Sky Blue: Bart, Jayson, Joe	(Melanie first coverage for BW/JM)
Sun: Tyler S, Josh, Tanner, Al	
Smoke: Nate, Katie, Andrew	

Capita Financial Services	
Address -	
14658 S Bangerter Pkwy, Ste 300 Draper, UT 84020	
Phone -	801-566-5058
Fax -	801-208-1113

Mike's Info	
Last 4 SSN	6771
DOB	10/16/1982