



**to send us documents/applications:**  
**FAX:** (609)-552-7297  
**EMAIL:** info.medfordlakes@simplicitygroup.com

**Pre-application**

**CONTRACTING, APPOINTMENTS, PRODUCT TRAINING,  
 QUOTES, ILLUSTRATIONS, HEALTH PRE-QUAL,  
 APPLICATIONS & PRODUCT QUESTIONS**

**Application processing**

**STATUS UPDATES,  
 OUTSTANDING  
 REQUIREMENTS**

**Administration**

**COMMISSION  
 PAYMENTS,  
 ESCALATION NEEDS**

**Advisors**

**ADVISOR  
 RELATIONSHIPS,  
 RECRUITING**



**ADVISOR DEVELOPMENT CONSULTANTS**

**Jordan Holt**  
**Life Insurance Specialist**  
 Direct: (763) 299-9335  
 Jordan.Holt@SimplicityGroup.com

**Victor Ferreira**  
**Sales Director**  
 Direct: (609) 552-7281  
 Victor.Ferreira@SimplicityGroup.com

**Patrick Manning**  
**Annuity Specialist**  
 Direct: (480) 417-4513  
 Patrick.Manning@SimplicityGroup.com

**Tony Spargo**  
**Sales Director**  
 Direct: (609) 552-7290  
 Tony.Spargo@SimplicityGroup.com

**CASE MANAGEMENT**

**Maria Wood**  
**Annuities**  
 Direct: (860) 734-1603  
 Maria.Wood@SimplicityGroup.com

**Joni Hogan**  
**Life**  
 Direct: (763) 237-3602  
 Joni.Hogan@SimplicityGroup.com

**Chelsea White**  
**Life**  
 Direct: (763) 237-3605  
 Chelsea.White@SimplicityGroup.com

**OPERATIONS**

**Kristy Dreyer**  
**Operations Director**  
 Direct: (609) 552-7280  
 Kristy.Dreyer@SimplicityGroup.com

**Alyson Higgins**  
**Case Mgmt Escalations**  
 Direct: (609) 552-7279  
 Alyson.Higgins@SimplicityGroup.com

**RECRUITING**

**Tim Kelly**  
**Partner**  
 Direct: (609) 552-7278  
 Tim.Kelly@SimplicityGroup.com

**Sam McGee**  
 Direct: (609) 552-7282  
 Sam.Mcgee@SimplicityGroup.com

**Tim C. Kelly**  
 Direct: (609) 552-7283  
 Timothy.Kelly@SimplicityGroup.com

**ADVISOR DEVELOPMENT CONSULTANTS**

**Jean Ausman**  
**LTC Specialist**  
 Direct: (312) 343-3234  
 Jean.Ausman@SimplicityGroup.com

**Kelly Maszk**  
**DI Specialist**  
 Direct: (480) 347-0286 ext.731  
 Kelly.Maszk@SimplicityGroup.com

**CASE MANAGEMENT**

**Jordan Engel**  
**LTC-Hybrid**  
 Direct: (763) 220-4837  
 Jordan.Engel@SimplicityGroup.com

**OPERATIONS**

**Sean Tomizawa**  
**Disability Insurance**  
 Direct: (206) 735-3194  
 Sean.Tomizawa@SimplicityGroup.com

**RECRUITING**

**Timothy Kelly**  
 Direct: (609) 552-7283  
 Timothy.Kelly@SimplicityGroup.com

**Cynthia Cullen**  
 Direct: (609) 552-7284  
 Cynthia.Cullen@SimplicityGroup.com