

# ManhattanLife - Annuities SBU - Phone Directory - External

Direct Mail:  
PO Box 2290  
Spokane WA 99210-2217

Overnight Mail:  
929 W Sprague Ave  
Spokane WA 99201

Local: 509.835.2500  
Toll Free: 800.247.2045  
Fax: 509.835.3190

## Annuity Operations (OPS)

The Annuity Operations office in Spokane, Washington, is the Home Office for Western United Life Assurance Company (WULA) and the Administrative Office for Manhattan Life Insurance Company (MLIC) annuities.

**Stephanie Lantzer** 2296 Operations Manager / HR  
**Cheryl VanStone** 3116 Operations Project Manager

## OPS - New Business Admin (NBA)

We process and assist with completion of all required new application paperwork, including outstanding pending requirements and requesting exchanges/transfers. We answer questions regarding interest rates, and requests for Duplicate Contracts when needed.

**Julie Singer** 3148 Manager / Underwriter  
**Madlyn Carrillo** 3185 Lead Underwriter  
**Piper Johnson** 3448 Lead Administrator Annuitant Last Names L - Z  
**Tiffany Rayburn** 3130 Administrator I / In Training Annuitant Last Names A - K  
**Mikayla Hoffman** 3160 Administrator I / In Training  
**Lexa Mathewson** 3167 Administrator I / In Training

## OPS - Contract Admin (CAD)

We provide information and answer questions regarding in-force contract provisions and values; provide withdrawal quotes and annuitization illustrations; process requests for withdrawals, surrenders, transfers, address, and ownership changes.

**Renee Balcom** 3182 Manager Annuitant Last Names S - Z  
**Khrystell Henning** 3110 Administrator II Annuitant Last Names A - E  
**Pam Hodnett** 3119 Administrator II Annuitant Last Names F - L  
**Jamie Kendrick** 3446 Administrator II Annuitant Last Names M - R

## OPS - Claim Admin (CLM)

We provide information, answer questions, and assist beneficiaries with the annuity contract death claim process.

**Carol Snyder** 3166 Manager  
**Bonnie Hartley** 3187 Administrator II

## OPS - Contract Accounting Admin (CAA)

We handle annuity contract deposit activities. This includes providing receipt letters, research, copies of checks, and answering questions regarding 5498 tax forms. We are responsible for banking, posting, and reconciling all funds received at the Annuity Operations Office.

**Brenda Scott, FLMI** 3180 Manager  
**Patty Hill** 3183 Administrator II  
**Kaitlyn Purdy** 3122 Compliance Service Rep I

## REG - Marketing Admin (MKT)

We work with the Annuity Regional Vice Presidents, to help our producers succeed in marketing our annuity products. We offer a wide range of services from establishing appointment contracts, to processing commissions, training, and licensing. We also provide illustration and website assistance.

**Joana Nieto** 3158 Lead Administrator  
**Melissa Curtis** 3161 Administrator II  
**Kora Smith** 3114 Administrator I / In Training

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## Regional Vice Presidents (REG)

<b>Jason Goehring</b> Regional Office: Garwood, TX	Phone: 713-202-7891    Email: JasonGoehring@wula.com States: AL, AR, FL, GA, LA, NC, MS, OK, PR, SC, TN, TX
<b>Jennifer Gray</b> Regional Office: Spokane, WA	Phone: 800.247.2045    Email: JenniferGray@wula.com States: CO, ID, MT, NE, OR, WY
<b>Jon Boyd</b> Regional Office: St Paul, MN	Phone: 651.256.9440    Email: JonBoyd@wula.com States: IA, IL, IN, KS, MI, MN, MO, ND, SD, WI
<b>Marc Puzzo, ChFC</b> Regional Office: Spokane, WA	Phone: 800.247.2045    Email: MarcPuzzo@wula.com States: AK, AZ, CA, HI, NM, NV, UT, WA
<b>Matt Loparco</b> Regional Office: Canton, CT	Phone: 844.534.0033    Email: MattLoparco@wula.com States: CT, DE, KY, MA, MD, ME, NH, NJ, NY, OH, PA, RI, VA, VT, WV

## Annuity Marketing States (not all plans are available in all states)

W M ✗ <input checked="" type="checkbox"/> Alabama - AL W M ✗ <input checked="" type="checkbox"/> Alaska - AK W M ✗ <input checked="" type="checkbox"/> Arizona - AZ W M ✗ <input checked="" type="checkbox"/> Arkansas - AR W M <input checked="" type="checkbox"/> California - CA W M ✗ <input checked="" type="checkbox"/> Colorado - CO W M ✗ <input checked="" type="checkbox"/> Connecticut - CT W M <input checked="" type="checkbox"/> Delaware - DE W M <input checked="" type="checkbox"/> Florida - FL W M <input checked="" type="checkbox"/> Georgia - GA W M ✗ <input checked="" type="checkbox"/> Hawaii - HI W M <input checked="" type="checkbox"/> Idaho - ID W M <input checked="" type="checkbox"/> Illinois - IL W M <input checked="" type="checkbox"/> Indiana - IN W M ✗ <input checked="" type="checkbox"/> Iowa - IA W M <input checked="" type="checkbox"/> Kansas - KS W M ✗ <input checked="" type="checkbox"/> Kentucky - KY	W M ✗ <input checked="" type="checkbox"/> Louisiana - LA W M ✗ <input checked="" type="checkbox"/> Maine - ME W M ✗ <input checked="" type="checkbox"/> Maryland - MD W M <input checked="" type="checkbox"/> Massachusetts - MA W M <input checked="" type="checkbox"/> Michigan - MI W M <input checked="" type="checkbox"/> Minnesota - MN W M ✗ <input checked="" type="checkbox"/> Mississippi - MS W M ✗ <input checked="" type="checkbox"/> Missouri - MO W M ✗ <input checked="" type="checkbox"/> Montana - MT W M ✗ <input checked="" type="checkbox"/> Nebraska - NE W M  Nevada - NV W M ✗ <input checked="" type="checkbox"/> New Hampshire - NH W M ✗ <input checked="" type="checkbox"/> New Jersey - NJ W M ✗ <input checked="" type="checkbox"/> New Mexico - NM M <input checked="" type="checkbox"/> New York - NY W M ✗ <input checked="" type="checkbox"/> North Carolina - NC W <input checked="" type="checkbox"/> North Dakota - ND	W M ✗ <input checked="" type="checkbox"/> Ohio - OH W M <input checked="" type="checkbox"/> Oklahoma - OK W M ✗ <input checked="" type="checkbox"/> Oregon - OR W M <input checked="" type="checkbox"/> Pennsylvania - PA M <input checked="" type="checkbox"/> Puerto Rico - PR W M ✗ <input checked="" type="checkbox"/> Rhode Island - RI W M ✗ <input checked="" type="checkbox"/> South Carolina - SC W ✗ <input checked="" type="checkbox"/> South Dakota - SD W M <input checked="" type="checkbox"/> Tennessee - TN W M ✗ <input checked="" type="checkbox"/> Texas - TX W M ✗ <input checked="" type="checkbox"/> Utah - UT W M ✗ <input checked="" type="checkbox"/> Vermont - VT W M ✗ <input checked="" type="checkbox"/> Virginia - VA W M <input checked="" type="checkbox"/> Washington - WA W M ✗ <input checked="" type="checkbox"/> West Virginia - WV W M ✗ <input checked="" type="checkbox"/> Wisconsin - WI W M <input checked="" type="checkbox"/> Wyoming - WY
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W Western United Life (WULA)   
 ✗ Follows NAIC Replacement Model   
  Requires Best Interest CE Training  
M Manhattan Life (MLIC)   
 ✓ Requires Annuity Suitability CE Training   
 Pending Best Interest CE Training Reqs