

COLLIN COUNTY
FY 2026 BROKER/DEALER LIST

FHN Financial Securities Corp
TD Securities Corporation (Acquisition Pending)
Broker Since: Jan 2000
CRD #46346 / SEC #8-51393
920 Memorial City Way, 11th Floor
Houston, TX 77024

Buddy Saragusa – CRD #6486777 / IRMA: No
(713) 435-4475 Office
buddy.saragusa@fhnfinancial.com

Great Pacific Securities
Broker Since: Oct 2025
CRD #29251 / SEC #8-44398
151 Kalmus Drive H8
Costa Mesa, CA 92626

Garrett Ng – CRD # 7020736 / IRMA: Yes
Peter Li – CRD #6048346 / IRMA: Yes
(714) 619-3000 Office
gng@greatpac.com
pli@greatpac.com

***Hilltop Securities**
Broker Since: Apr 1989
CRD #6220 / SEC #8-45123
700 Milam Street, Suite #1200
Houston, TX 77002

Gilbert Ramon – CRD #2135146 / IRMA: No
(713) 654-8606 Direct
Gilbert.Ramon@HilltopSecurities.com

Mischler Financial Group
Broker Since: Oct 2024
CRD #22098 / SEC #8-39547
19800 MacArthur Blvd, STE 600
Irvine, CA 92612

Steve Neri – CRD #4292532 / IRMA: No
(949) 629-7627 Office / (949) 292-2580 Cell
SNeri@mischlerfinancial.com

Multi-Bank Securities, Inc.
Broker Since: Feb 2012
CRD #22098 / SEC #8-39547
1811-A Hwy 281 North, Suite #1
Marble Falls, TX 78654

Fernando Pulido – CRD #5634138 / IRMA: Yes
(800) 967-9045 Office / (954) 552-3423 Cell
FPulido@mbssecurities.com

***Oppenheimer & Co., Inc.**
Broker Since: Oct 2013
CRD #249 / SEC #8-4077
100 South 5th Street, Suite #2200
Minneapolis, MN 55402

Chris Sullivan – CRD #4731737 / IRMA: Yes
Jack Fay – CRD #5586214 / IRMA: Yes
Lorraine Welch – CRD #2025979 / IRMA: Yes
(612) 337-2719 Office
chris.sullivan@opco.com
jack.fay@opco.com
lorraine.welch@opco.com

***RBC Capital Markets, LLC**
Since: Apr 2022
CRD # 31194 / SEC #13059
400 Robert Street N, Suite 1400
St Paul, MN 55101

Michael Meyer – CRD #4535315 / IRMA: No
Reid R. Christianson – CRD # / IRMA: No
(800) 388-7125 Office / (612) 373-1981 Cell
Michael.a.meyer@rbc.com
Reid.Christianson@rbc.com

Stifel Nicolaus & Company, Inc.

Since: May 1998

CRD #793 / SEC #8-1447

775 Ridge Lake Blvd., Suite 200

Memphis, TN 38120

*Independent Advisor Firm

Darlyne Haba – CRD #5361931 / IRMA: No

(800) 786-1268 Toll Free / (901) 603-4492 Cell

darlyne.haba@viningsparks.com

COLLIN COUNTY
FY 2026 BANK ACCOUNTS

American National Bank**

Since: Oct 2008

Allen Banking Center
720 S. Greenville Ave.
Allen, TX 75002

***American National Bank serves as depository and provides banking services for Collin County. Agreement effective until May 31, 2025.*

American National Bank

Since: Oct 2008

102 West Moore Avenue
Terrell, TX 75160

American National Bank

Since: Oct 2008

Wealth Management Group Trust Services
1010 W. Ralph Hall Parkway, Suite #112
Rockwall, TX 75032

American National Bank

Since: January 2024

Wealth Management Group Trust Services
1010 W. Ralph Hall Parkway, Suite #112
Rockwall, TX 75032

East West Bank

Since: Dec 2017

9090 Katy Freeway, 3rd Floor
Houston, TX 77024

Farmer's Bank & Trust

Since: Mar 2017

750 Preston Road
Prosper, TX 75078

Colleen Biggerstaff

Banking Center Manager

(214) 863-5967

ColleenBiggerstaff@anbtx.com

Greg Jebsen

Finance – ALM, Municipalities, Deposits

(214) 863-6617

GregJebsen@anbtx.com

Vickie Gutierrez

AVP & Trust Officer

(214) 863-6548 Office

VickieGutierrez@anbtx.com

Justin Fruhwirth

**Senior Portfolio Manager/Financial
Advisor/Vice President**

(214) 863-6944 Office

JustinFruhwirth@anbtx.com

Jia Li

AVP-Client Services Manager

(832) 973-8934 Office / (281) 386-1889 Cell

Jia.Li@eastwestbank.com

Ray Smith

Market President

(469) 296-1246 Office / (214) 232-8806 Cell

Ray.Smith@myfarmers.bank

COLLIN COUNTY
FY 2026 POOLED FUNDS INVESTMENT ACCOUNTS

LOGIC

Since: Nov 1994
717 N. Harwood
Suite #3400
Dallas, TX 75201

Lance T. Flores

Regional Sales Representative
Logic Participant Services (800) 895-6442
(800) 839-7827 Toll Free
(214) 953-4170 Direct
lance.flores@hilltopsecurities.com

Texas CLASS

Since: Sep 2013
2435 North Central Expressway
Suite #1200
Richardson, TX 75080

Karen Proctor

Regional Director
(800) 707-6242 Toll Free
(855) 848-9910 Cell
Karen.proctor@texasclass.com

Texas FIT

Water Walker Investments

Since: Dec 2019
PO Box 780547
San Antonio, TX 78278

Ken Couch

Director
(210) 888-0452 Direct
ken@waterwalkerinvestments.com

Texas-Range (Formerly Texas TERM)

Since: Jun 2015
180 State Street
Suite #225
Southlake, TX 76092

Shelly Ilgenfritz

Client Consultant
(866) 839-8376 Option 3
ilgenfritzs@pfmam.com

TexPool

Since: May 1997
1001 Texas Avenue
Suite #1150
Houston, TX 77002

David Perez

Sales Associate
(626) 255-9165
(866) 839-7665 Participant Services
David.Perez@federatedhermes.com

TexSTAR

Since: Oct 2002
717 N. Harwood
Suite #3400
Dallas, TX 75201

Lance T. Flores

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(214) 953-4170 Direct
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