

RFP FOR PENSION BENEFIT CONSULTANT

RFP DUE DATE: FEBRUARY 7, 2017
RFP DUE TIME: 2:30 P.M.
RFP No.: 015-1210-17/JMA

"Offers from the vendors listed herein are the only offers received timely as of the above receiving date and time. All other offers submitted in response to this solicitation, if any, are hereby rejected as late"

VENDORS	AON HEWITT 7650 W. Courtney Campbell Causeway Tampa, FL 33607 Tel: (813) 636-3533 E-mail: mark.meyer.2@aonhewitt.com Contact: Mark Meyer	BOLTON PARTNERS, INC. 36 S. Charles Street, Suite 1000 Baltimore, MD 21201 Tel: (410) 547-0500 Fax: (443) 658-1924 E-mail: tlowman@boltonpartners.com Contact: Thomas Lowman	THE NYHART COMPANY 8415 Allison Pointe Blvd., Suite 300 Indianapolis, IN 46250 Tel: (317) 845-3500 Fax: (317) 845-3650 E-mail: david.harris@hyhart.com Contact: David D. Harris
ONE ORIGINAL AND THREE COPIES SUBMITTED	YES	YES	YES
INTRODUCTION LETTER	YES	YES	YES
TABLE OF CONTENTS	YES	YES	YES
QUALIFICATIONS AND EXPERIENCE OF THE FIRM SUBMITTED	YES	YES	YES
TECHNICAL APPROACH: e.g. Past municipal experience and approach Firm will take throughout project.	YES	YES	YES
FEE PROPOSAL SUBMITTED	\$35,000.00	\$60,000.00	\$47,000.00
HOURLY RATE FOR ADDITIONAL WORK:	\$399.00	\$300.00	Consulting Actuary: \$375.00 Credentialed Actuary: \$290.00 Actuarial Analyst: \$185.00 Admin. Assistance: \$95.00
REFERENCES SUBMITTED	YES	YES	YES
PROPOSER'S ACKNOWLEDGEMENT SUBMITTED	YES	YES	YES
STATEMENT OF QUALIFICATIONS SUBMITTED	YES	YES	YES

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ANTI-KICKBACK AFFIDAVIT SUBMITTED	YES	YES	YES
NON COLLUSION AFFIDAVIT SUBMITTED	YES	YES	YES
CONFIRMATION OF MINORITY OWNED BUSINESS SUBMITTED	YES/NOT A MINORITY OWNED BUSINESS	YES/NOT A MINORITY OWNED BUSINESS	YES/NOT A MINORITY OWNED BUSINESS
CONFIRMATION OF DRUG FREE WORKPLACE SUBMITTED	YES	YES	YES
ACKNOWLEDGEMENT OF PBC INSPECTOR GENERAL	YES	YES	YES
SCHEDULE OF SUBCONTRACTORS SUBMITTED	YES/NONE	YES/NONE	YES/NONE
CURRENT LICENSES/CERTIFICATES OF AUTHORIZATION SUBMITTED	YES	YES	YES
PROOF OF INSURANCE SUBMITTED	YES	YES	YES
COMMENTS:	Resumes included.	Powerpoint included	Articles of Incorporation included

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VENDORS	SAGEVIEW ADVISORY GROUP 1645 Palm Beach Lakes Blvd., Suite 1200 West Palm Beach, FL 33401 Tel: (561) 801-2556 Fax: (561) 615-2001 E-mail: jpetrone@sageviewadvisory.com Contact: Jeffrey Petrone		
ONE ORIGINAL AND THREE COPIES SUBMITTED	YES		
INTRODUCTION LETTER	YES		
TABLE OF CONTENTS	YES		
QUALIFICATIONS AND EXPERIENCE OF THE FIRM SUBMITTED	YES		
TECHNICAL APPROACH: e.g. Past municipal experience and approach Firm will take throughout project.	YES		
FEE PROPOSAL SUBMITTED	\$40,000.00 to \$50,000.00		
HOURLY RATE FOR ADDITIONAL WORK:	\$175.00 to \$435.00 (Varies by Position)		
REFERENCES SUBMITTED	YES		
PROPOSER'S ACKNOWLEDGEMENT SUBMITTED	YES		
STATEMENT OF QUALIFICATIONS SUBMITTED	YES		

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VENDORS	SAGEVIEW ADVISORY GROUP 1645 Palm Beach Lakes Blvd., Suite 1200 West Palm Beach, FL 33401 Tel: (561) 801-2556 Fax: (561) 615-2001 E-mail: jpetrone@sageviewadvisory.com Contact: Jeffrey Petrone		
ANTI-KICKBACK AFFIDAVIT SUBMITTED	YES		
NON COLLUSION AFFIDAVIT SUBMITTED	YES		
CONFIRMATION OF MINORITY OWNED BUSINESS SUBMITTED	YES/NOT A MINORITY OWNED BUSINESS		
CONFIRMATION OF DRUG FREE WORKPLACE SUBMITTED	YES		
ACKNOWLEDGEMENT OF PBC INSPECTOR GENERAL	YES		
SCHEDULE OF SUBCONTRACTORS SUBMITTED	YES/NONE		
CURRENT LICENSES/CERTIFICATES OF AUTHORIZATION SUBMITTED	YES		
PROOF OF INSURANCE SUBMITTED	YES		
COMMENTS:	Resumes and brochure included		