



QUESTIONS AND RESPONSES
PROJECT: THIRD PARTY ADMINISTRATOR
BID NO.: RFP No. AVC2016/2017-4

Notice to Bidders on the Above Project:

This document consists of: **Questions and responses (deadline to submit is 12/13/16)**

Q-1. Which firm currently provides these services and is the firm eligible to rebid?

A-1. American Fidelity, Yes they are eligible to rebid.

Q-2. What are the total assets in the 403(b) and 457(b) plans, separately and/or total for the two, whichever is more convenient for you to retrieve?

A-2. What do you mean by assets total amount employee contributes?

Q-3. Whether companies from Outside USA can apply for this? (like, from India or Canada)

A-3. We would prefer a more local presence and availability.

Q-4. Whether we need to come over there for meetings?

A-4. We would prefer a more local presence and availability.

Q-5. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

A-5. We would prefer a more local presence and availability.

Q-6. Can we submit the proposals via email?

A-6. No, we do not accept email proposals. Refer to "Submittal of Proposal" in the RFP documentation.

Q-7. Do you currently have an advisory group for the 403b and 457b plans? Some TPAs do both or are affiliated with one, which is why I ask.

A-7. No advisory group

Q-8. Who is the provider (i.e. Nationwide, Empower, Mass Mutual)? Most providers at this level do both so I want to make sure we're compatible with them.

A-8. American Fidelity

Q-9. Can you provide the names of the service providers/vendors you are using as approved 403(b) providers and how many participants are with each? Can we obtain this information for the 457 as well? We need this date to determine pricing.

A-9. American Fidelity, Americo Financial life & Annuity Insurance Co., Ameriprise Financial Services, AXA Equitable Life Ins. Co., California State Teachers Retirement, Forester Financial Services, Great American Financial Resources, Horace Mann Life Insurance Co., Life Insurance of the Southwest, Industrial Alliance Insurance & Financial Service ,Metropolitan Life Insurance Company, Midland National, New York Life Ins. & Ann Corp, Plan member Services, Security Financial Resources, the Variable Annuity Life Ins Co., VOYA Reliastar Life Insurance Company, VOYA Retirement Insurance & Annuity, Waddell & Reed Inc. and 457b TIAA CREF, 457b Security Benefit and 457b American Fidelity.

Total employees contributing to a 403b and 457b =152

Q-10. Is it necessary for references to be Colleges/Universities? Are permitted to use K-12 Districts as well?

A-10. Yes, K-12 Districts permitted as well.

Q-11. Have any addenda been issued for this RFP yet? We recently registered on publicpurchase.com and I am not sure if we missed any.

A-11. No

Q-12. On page 12 of the RFP pdf file under "Participant Services", question e., it says "Communication and Education". Is that a typo that was supposed to be a new underline section name? "e. Communications and Education"

A-12. That I do not know.

All other terms and conditions remain the same.


Denise Anderson, Buyer

12/19/2016
Date