

**PASCO SHERIFF'S OFFICE  
Purchasing Department  
General RFP/RFQ Opening Form**

**RFP:** 1FY21 **Title** 457(b) Plan

**Date and Time:** 12/17/2020 at 10am EST

Company Name	Envelope Sealed and Marked	Ten (10) bound copies of each response (one (1) original and nine (9) copies)	Two (2) electronic copies of the entire response (ONE (1) COMPLETE & ONE (1) REDACTED)	Currently recordkeeping at least \$1 Billion of government entity defined contribution (401(a)/457(b)) assets from a minimum of 20 distinct government plan sponsors.	Full open architecture investment platform, with no proprietary investment requirements.	Availability of a wide range of zero revenue funds.	Establishment of a fixed revenue requirement fee structure, with any potential excess revenue credited back to the plan at the fund and participant level.	Utilization of plan sponsor directed group (versus individual) contracts.	No Deferred Sales Charges or similar contract termination penalties at the plan or participant level (investment-level market value adjustments, redemption fees, puts, and installment payouts are not expressly prohibited).	Contract termination at plan sponsor discretion, without proving cause, at any time, upon reasonable notice.	Participation in the Retirement Plan Advisory Group (RPAG) database. Many retirement plan providers participate in the RPAG database and the information in this database will be used by the Sheriff's Office in evaluation of submittals.	A minimum of 10 days annually of on-site employee meetings conducted by qualified education specialists.	Estimated annual fee information	Disqualified
Nationwide	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
ICMA Retirement Corporation	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Empower Retirement	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Mass Mutual	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Voya	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Lincoln	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
AIG	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	

Pasco Sheriff's Office, Designee Signature Title:

*Jasmin Ortiz* Assistant Purchasing Manager

Witness Signature Title:

\_\_\_\_\_  
FINANCE DIRECTOR