

Kurt S. Browning, Superintendent of Schools

7227 Land O' Lakes Boulevard . Land O' Lakes, Florida 34638

Department of Purchasing

Michael J. Woodall, CPPO, Purchasing Agent

813/ 794-2221 Fax: 813/ 794-2111

727/ 774-2221 TDD: 813/ 794-2484

352/ 524-2221 e-mail: mwoodall@pasco.k12.fl.us

December 18, 2012

MEMORANDUM

TO:

Honorable School Board Members

FROM:

Michael Woodall, CPPO, Purchasing Agent

SUBJECT:

One-Year Extension to Five-Year Agreements

RFP 08-006-AZ, Voluntary Investment Products

On November 1, 2011, official action was taken to renew the above-referenced RFP for voluntary investment products to ten (10) separate providers, as follows:

Ameriprise Financial Services

Metl ife

AXA-Equitable

Suncoast Schools Federal Credit Union

Horace Mann

The Legend Group

ING

Valic

Lincoln Investment Planning

Waddell & Reed

The RFP provides a mix of products and services to employees for investments, education and administrative services with regard to the District's Internal Revenue Code "IRC" Sections 403(b)/403(b)(7) Tax Sheltered Accounts and 457(b) Deferred Compensation Plans. The fifth year term will expire on December 31, 2012.

The original RFP allows the District to extend the term of the contract by one (1) year, upon mutual agreement of the parties. Service from all firms noted above has been satisfactory (see attached memo from Ms. Mary Tillman, Director of Employee Benefits & Risk Management, for further information.) Accordingly, all firms were contacted to determine their willingness to extend the contract for the term January 1, 2013 - December 31, 2013. All have agreed in writing (attached) to do so. There is no cost to the Board for this program, as the participating firms are assessed a fee of \$1000 per year plus a per-participant fee of \$6.00.

We are recommending the one (1)-year extension of the contract with the firms noted above. Should you have any questions or concerns, please contact Mary Tillman or me at your earliest convenience.

MJW/az Attachments

Date/Time: December 12, 2012 09:32:00

(813) 794-2000 • (352) 524-2000 • (727) 774-2000 • www.pasco.k12.fl.us The District School Board of Pasco County is System Accredited by AdvancED/ Southern Association of Colleges and Schools



District School Board of Pasco County

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638 • 813/794-2000

Heather Fiorentino, Superintendent

www.pasco.k12.fl.us

Employee Benefits, Assistance & Risk Management

Mary Tillman, Director

813/ 794-2759 Fax: 813/ 794-2173 727/ 774-2759 TDD: 813/ 794-2484

352/ 524-2759

e-mail: mtillman@pasco.k12.fl.us

DATE:

December 18, 2012

TO:

Michael Woodall, Purchasing Agent

FROM:

Mary Tillman, Director of Employee Benefits Mary H. Fillman

RE:

2013 Renewal for Voluntary Investment Products

On August 21, 2007, RFP 08-006-AZ for Voluntary Investment Products was awarded to the following providers:

- 1) AIG VALIC
- 2) ING
- 3) Horace Mann
- 4) Suncoast Schools Credit Union
- 5) MetLife
- 6) Lincoln Investment Planning
- 7) AXA Equitable

- 8) The Legend Group
- 9) Great American Financial Resources*
- 10) The Hartford*
- 11) Waddell & Reed
- 12) Life of the Southwest*
- 13) Symetra Financial*
- 14) Ameriprise

The District is currently in the fifth year of the five year contract. The original RFP allows for an extension of one (1) year.

The services provided by all of the remaining providers have been satisfactory and I recommend extending the contracts through calendar year 2013 with the vendors noted above.

All of the providers listed above have agreed in writing to renew the contract for 2013 under the same terms and conditions.

Please request permission from the Board to approve these renewals. If you have any questions or need any additional information, please call me. As always, I appreciate the assistance that I have received from you and your staff during this process.

^{*} Contracts for Great American Financial Resources, The Hartford, Symetra, Financial and Life of the Southwest were non-renewed as of December 31, 2009 due to insufficient number of participants.

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813-794-2173



DISTRICT SCHOOL BOARD OF PASCO COUNTY

Kurt S. Browning, SuperIntendent : Schools

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e-mail: mwoodall@pasco.k12.fl.us

RFP #08-006-AZ EXTENSION REQUES VOLUNTARY INVESTMENT PRODUCTS PRO FILAM

X	Yes, I agree to extend RFP 08-006-AZ, under existing terms and conditions. The extension period shall be from January 1, 2013 through December 31, 2013.			
	No, I do not agree to extend the above-referenced F FP with the District School Board of Pasco County.			
Company Na	me: AMERIPRISE FINANCIAL			
Company	Darkon Burbana Date: 11/14/2012			
Signature: And M. Durvana Date: _10/14/1001				
Type Name:				
Telephone Number with Area Code: 18/3 1994-1198				
FAX Numbe	r with Area Code (8/3) 994- 1336			
F-Mall Address for General Company Contact: Cheryl, m. burbana Bampf. com.				
The compa	ny certifles, by submission and signature on this renew: I form, that neither it nor is are presently debarred, suspended, proposed for debarnent, declared ineligible, life excluded from participation in this transaction per the provisions of Florida			
	TO THE PART TO THE TOTAL TOTAL TO THE TOTAL			

PLEASE E-MAIL BACK TO:

District School Board of Pasco County

Attention: Patricla Howard

Employee Benefits, Assistance and Risk Manager wait

7227 Land O' Lakes Blvd.

Land O' Lakes, FL 94638

Phone: (813) 794-2345

FAX: (813) 794-2173

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DISTRICT SCHOOL BOARD OF PASCO COUNTY

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352/ 524-2221 e-mail: mwoodall@pasco.k12.fl.us

REP #08-006-AZ EXTENSION REQUES

VOLUNTARY INVESTMENT PRODUCTS PRO I LIAM
Yes, I agree to extend RFP 08-006-AZ, under existing terms and conditions. The extension period shall be from January 1, 2013 through December 31, 2013.
No, I do not agree to extend the above-referenced 112 with the District School Board of Pasco County.
Company Name: AXA-EQUITABLE Date: 1/6/12
Type Name: Steven Smitten Title: Vic President
Telephone Number with Area Code: (813) 466-3142
FAX Number with Area Code (8)3) 289-8774
E-Mail Address for General Company Contact: Steven. Smitter @axa-acluses.com
The company certifies, by submission and signature on this renewall form, that neither it not its principals are presently debarred, suspended, proposed for determent, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of Florida Statute 287.133(2)(a).
PLEASE E-MAIL BACK TO:
District School Board of Pasco County Attention: Patricia Howard

Employee Benefits, Assistance and Risk Manag reent 7227 Land O' Lekes Blvd. Land O' Lakes, FL 34638 Phone: (813) 794-2345

FAX: (813) 794-2173



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727/774-2221 TDD; 813/794-2484 352/524-2221 e-mail: mwoodall@pasco.k12.fl.us

RFP #08-006-AZ EXTENSION REQUEST **VOLUNTARY INVESTMENT PRODUCTS PROGRAM**

Yes, I agree to extend RFP 08-006-AZ, under existing terms and conditions. The extension period shall be from January 1, 2013 through December 31, 2013.			
No, I do not agree to extend the above-referenced RFP with the District School Board of Pasco County.			
Company Name: HORACE MANN			
Signature: Licio Seifeit Date: 11/29/2012			
Type Name: Tricia Seifert Title: AVP, Market Alliance			
Telephone Number with Area Code: (866) 999–1945			
FAX Number with Area Code (800) 217–7351			
E-Mail Address for General Company Contact: tricia.seifert@horacemann.com			
The company certifies, by submission and signature on this renewal form, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of Florida Statute 287.133(2)(a).			
PLEASE E-MAIL BACK TO:			

District School Board of Pasco County

Attention: Patricia Howard

Employee Benefits, Assistance and Risk Management

7227 Land O' Lakes Blvd. Land O' Lakes, FL 34638

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FAX: (813) 794-2173



Kurt S. Browning, Superintendent of Schools

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352/ 524-2221 e-mail: mwoodall@pasco.k12.fl.us

RFP #08-006-AZ EXTENSION REQUEST **VOLUNTARY INVESTMENT PRODUCTS PROGRAM**

No, I do not agree to extend the above-referenced RFP with the District School Board of Pasco County. Company Name: ING
그 이렇게 한 가장 교실 그렇게 되는 그릇을 모르는 말을 때면서 그는 그릇 하는 것 같은 점점 없는 생님에 참고를 먹으면 하는 것 같다.
B. MA 1. 11 (30.30)
Signature: Date: November 30, 2013
Type Name: BRIAN V. MURPHY Title: VICE PRESIDENT
Telephone Number with Area Code: <u>(860)</u> 550-1651
FAX Number with Area Code (860) 580 - 1665
E-Mail Address for General Company Contact: kasi. Boyles @ us. ing. com
The company certifies, by submission and signature on this renewal form, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of Florida Statute 287.133(2)(a).

PLEASE E-MAIL BACK TO:

District School Board of Pasco County

Attention: Patricia Howard

Employee Benefits, Assistance and Risk Management

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Kurt S. Browning, Superintendent o Schools

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Department of Purchasing Michael J. Woodall, CPPO, Purchaeing Agent

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TDD: 813/794-2484

352/ 524-2221 e-mail: mwoodali@pasco.k12.fl.us

RFP #08-006-AZ EXTENSION REQUEST

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	PLEASE E-MAIL BACK TO:	
its principals ar	certifies, by submission and signature on this renewal form, that neither it nor are presently debarred, suspended, proposed for debarnent, declared ineligible, excluded from participation in this transaction per the arovisions of Florida 33(2)(a).	
E-Mail Address	ss for General Company Contact: adserv 4036 @ legendgroup.com	n
	with Area Code: 561, 775-7635	
Telephone Nun	Imber with Area Code: 1561, 694-0110	ā
Type Name: _	Cynthia Kleymann Title: Assistant Vice Preside	1
Signature:	Date: 11 20 20112	
Company Name	ne: THE LEGENTO GROUP	
	Board of Pasch County.	
1	No, I do not agree to extend the above-referenced R :) with the District School	
	conditions. The extension period shall be from Janua 1/1, 2013 through December 31, 2013.	
	Yes, I agree to extend RFP 08-006-AZ, under existing ::: ms and	
1	VOLUMIARY INVESTIMENT PRODUCTS PROCESSION	

District School Board of Pasco County

Attention: Patricia Howard

Employee Benefits, Assistance and Risk Manager 1:11

7227 Land O' Lakes Blvd. Land O' Lakes, FL 34638

Phone: (813) 794-2345 FAX: (813) 794-2173



Kurt S. Browning, Superintendent of Schools

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RFP #08-006-AZ EXTENSION REQUEST **VOLUNTARY INVESTMENT PRODUCTS PROGRAM**

,		
	Yes, I agree to extend RFP 08-006-AZ, under existing terms and conditions. The extension period shall be from January 1, 2013 through December 31, 2013.	
	No, I do not agree to extend the above-referenced RFP with the District School Board of Pasco County.	
Company Nan	ne: LINCOLN INVESTMENT PLANNING	
Signature:	STEPHEN QUICKEL Title: SENIOR VICE PRESIDENT	
Type Name: _	STEPHEN QUICKEL Title: SENIOR VICE PRESIDENT	
Telephone Nu	mber with Area Code: <u>(215)</u> 887-8111	
FAX Number v	vith Area Code _(
E-Mail Addres	s for General Company Contact: PLANDOCUMENTS @ LincolNinVESTMENT,	
its principals a	certifies, by submission and signature on this renewal form, that neither it nor re presently debarred, suspended, proposed for debarment, declared ineligible, excluded from participation in this transaction per the provisions of Florida (3(2)(a).	
PLEASE E-MAIL BACK TO:		
2000		

District School Board of Pasco County Attention: Patricia. Howard

Employee Benefits, Assistance and Risk Management

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DISTRICT SCHOOL BOARD OF PASCO COUNTY

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RFP #08-006-AZ EXTENSION REQUEST VOLUNTARY INVESTMENT PRODUCTS PROGRAM

X	Yes, I agree to extend RFP 08-006-AZ, under existing terms and conditions. The extension period shall be from January 1, 2013 through December 31, 2013.
	through a data

No, I do not agree to extend the above-referenced I III' with the District School Board of Pasco County.

Roald of Lagina dament
Company Name: METUFE
Signature State Duty Date: _11/15/12
Type Name: OCTAVIO SANDS JR. Title: REGIONAL MANAGING DIRECTOR
Type Name: = 232-2075 ext 13
Type Name: OCIAVIO GRODES DIELEGOR Telephone Number with Area Code: (407) 333-3076 ext 13 Telephone Number with Area Code: (407) 333-3346
E Mail Address for General Company Contact:
The company certifies, by submission and signature on this rene will form, that neither it nor its principals are presently debarred, suspended, proposed for department, declared ineligible, or voluntarily excluded from participation in this transaction per tree provisions of Florida Statute 287.133(2)(a).
PLEASE E-MAIL BACK TO:

Statute 287.133(2)(8).	1	Н		
	PLEASE E-MAIL BACK TO:	B 0 10-		Service -
	District School Board of Pasco County			
	Attention: Patricia Howard	l :	(•)	1
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	Land Of Lalbers, FL 34638			
ĺ	Phone: (813) 794-2345	i	; · · · · · · · ·	
	FAX: (813) 794-2173		to a success and	·
	Deadline: December 3, 2012			_]!
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Kurt S. Browning, Superintendent o 3chools

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Department of Purchasing Michael J. Woodall, CPPO, Purchasing Agent 813/794-2221 Fax: 813/794-2111 727/774-2221 TDD: 813/794-2484

e-mail mwoodalk@pasco.k12,fl.us 352/524-2221

RFP #08-006-AZ EXTENSION REQUEST VOLUNTARY INVESTMENT PRODUCTS PROCESAM

<u></u>	Yes. I agree to extend RFP 08-006-AZ, under existing terms and conditions. The extension period snall be from January 2, 2013 through December 31, 2013.
A maritime of the second	No, I do not agree to extend the above-referenced FFF with the District School Board of Pasco County.
Company Nar	ne: SUNCOAST SCHOOLS FCU
Signature:	Rand Date:11-19-2012
Type Name:	ROYECHOUS Title: VICE PREIDENT
Telephone N	umber with Area Code: (813) 246-521/ EXT. 86727
FAX Number	with Area Code (866) 409-4478
E-Mail Addre	ss for General Company Contact: roy-echols @ Suncoast fou org
The company	y certifies, by submission and signature on this renew 1 form, that neither it nor are presently debarred, suspended, proposed for del 4 rment, declared ineligible, y excluded from participation in this transaction per t (2 provisions of Florida
	PLEASE E-MAIL BACK TO:
	District School Board of Pasco County Attention: Patricia Howard
	Employee Benefits, Assistance and Risk Manage finent 7227 Land O' Lakes Blvd.
	Land O' Lakes, FL 34638
	Phone: (813) 794-2345
	FAX: (813) 794-2173

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DISTRICT SCHOOL BOARD OF PASCO COUNTY

Kurt S. Browning, Superintendent of Echools

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352/ 524-2221 e-mail: mwoodallit2pasco,k12.fl.us

RFP #08-006-AZ EXTENSION REQUEST VOLUNTARY INVESTMENT PRODUCTS PROCULAM

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N	Yes, I agree to extend RFP 08-006-AZ, under existing terms and conditions. The extension period shall be from Janua 11. 2013 through December 31, 2013.		
	No, I do not agree to extend the above-referenced R = 2 with the District School Board of Pasco County.		
Company Nai	me: VALIC		
Signature:	Do Ol Buch Date: 11/19/12		
Type Name:	Todd Buchanan Title:		
Telephone Number with Area Code: 1813 1219-3320			
FAX Number with Area Code (813) 269 3370			
E-Mail Address for General Company Contact: 10dd . buchanana VALIC. Com			
E-Mail Address for General Company Contact:			
The company certifies, by submission and signature on this renewal form, that neither it nor its principals are presently debarred, suspended, proposed for debarrent, declared ineligible, or voluntarily excluded from participation in this transaction per the provisions of Florida Statute 287.133(2)(a).			
PLEASE E-MAIL BACK TO:			

District School Board of Pasco County

Attention: Patricia Howard

Employee Benefits, Assistance and Risk Manager unit

7227 Land O' Lakes Blvd. Land O' Lakes, FL 34638

Phone: (613) 794-2345 FAX: (813) 794-2173

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DISTRICT SCHOOL BOARD OF MASCO COUNTY

Kurt S. Browning, Superintendent or signools

7227 Land O' Lakes Boulevard . Land O' Le ()5. Florida 34638

Department of Pr	all CPPO, PUICIBURING AN	ent
813/794-2221	Fax: 813/794-2111 TDD: 813/794-2484	12
727/774-2221 352/524-2221	e-mall: mwoodall@paso	o.k12.fl.us

RFP #08-006-AZ EXTENSION REQUEST VOLUNTARY INVESTMENT PRODUCTS PROC LAW Yes, I agree to extend RFP 08-006-AZ, under existing terms and conditions. The extension period shall be from Januar / 1, 2013 through December 31, 2013. No, I do not agree to extend the above-referenced RFF with the District School Board of Pasco County. Company Name: WADDELL & REED Date: Signature: Title: Type Name: Telephone Number with Area Code: FAX Number with Area Code E-Mail Address for General Company Contact: d5chmidf@waddell.com The company certifies, by submission and signature on this renew a form, that neither it nor its principals are presently debarred, suspended, proposed for deliminent, declared ineligible, or voluntarily excluded from participation in this transaction per t 12 provisions of Florida Statute 287.133(2)(a).

PLEASE E-MAIL BACK TO:

District School Board of Pasco County

Attention: Patricia Howard

Employee Benefits, Assistance and Risk Manager reant

7227 Land O' Lakes Blvd.

Land O' Lakes, FL 84638

Phone: (813) 794-2345

FAX: (813) 794-2173