



DISTRICT SCHOOL BOARD OF PASCO COUNTY

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 *MJW*

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	MetLife
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. Tillman*

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 | 8) The Legend Group |
| 2) ING | 9) Great American Financial Resources* |
| 3) Horace Mann | 10) The Hartford* |
| 4) Suncoast Schools Credit Union | 11) Waddell & Reed |
| 5) MetLife | 12) Life of the Southwest* |
| 6) Lincoln Investment Planning | 13) Symetra Financial* |
| 7) AXA Equitable | 14) Ameriprise |

* 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.

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.

11/14/2012 13:34

813-794-2173

EBARM



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RFP #08-006-AZ EXTENSION REQUEST VOLUNTARY INVESTMENT PRODUCTS PROXY PLAN

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 RFP with the District School Board of Pasco County.

Company Name: **AMERIPRISE FINANCIAL**

Signature: Cheryl M. Burbano Date: 11/14/2012

Type Name: Cheryl M. Burbano Title: Financial Advisor

Telephone Number with Area Code: 813 994-1190

FAX Number with Area Code: (813) 994-1336

E-Mail Address for General Company Contact: cheryl.m.burbano@ampf.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
Phone: (813) 794-2345
FAX: (813) 794-2173

Deadline: December 3, 2012



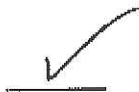
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RFP #08-006-AZ EXTENSION REQUEST VOLUNTARY INVESTMENT PRODUCTS PROGRAM



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 Name: AXA-EQUITABLE

Signature: [Handwritten Signature]

Date: 11/6/12

Type Name: Steven Smitten

Title: Vice-President

Telephone Number with Area Code: (813) 466-3142

FAX Number with Area Code: (813) 289-8774

E-Mail Address for General Company Contact: steven.smitten@axa-advisors.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).

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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 Name: **HORACE MANN**

Signature: Tricia Seifert 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).

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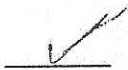
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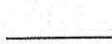
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RFP #08-006-AZ EXTENSION REQUEST VOLUNTARY INVESTMENT PRODUCTS PROGRAM



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 Name: **ING**

Signature: Brian J. Murphy Date: November 30, 2012

Type Name: BRIAN J. MURPHY Title: VICE PRESIDENT

Telephone Number with Area Code: (860) 580-1651

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).

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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 Name: **THE LEGEND GROUP**

Signature: Date: 11/20/2012

Type Name: Cynthia Kleymann Title: Assistant Vice President

Telephone Number with Area Code: (561) 694-0110

FAX Number with Area Code: (561) 775-7635

E-Mail Address for General Company Contact: adserv403b@legendgroup.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).

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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 Name: **LINCOLN INVESTMENT PLANNING**

Signature: Stephen Quickel Date: 11-30-2012

Type Name: STEPHEN QUICKEL Title: SENIOR VICE PRESIDENT

Telephone Number with Area Code: (215) 887-8111

FAX Number with Area Code ()

E-Mail Address for General Company Contact: PLANDOCUMENTS@LINCOLNINVESTMENT.COM

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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.

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

Company Name: **METLIFE**

Signature: *Octavio Santos Jr.*

Date: 11/15/12

Type Name: OCTAVIO SANTOS JR.

Title: REGIONAL MANAGING DIRECTOR

Telephone Number with Area Code: (407) 333-3078 ext 13

FAX Number with Area Code: (407) 333-3346

E-Mail Address for General Company Contact: osantos@metlife.com

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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: **SUNCOAST SCHOOLS FCU**

Signature: *Roy Echols* Date: 11-19-2012

Type Name: ROY ECHOLS Title: VICE PRESIDENT

Telephone Number with Area Code: (813) 246-5211 EXT. 86727

FAX Number with Area Code: (866) 409-4478

E-Mail Address for General Company Contact: roy.echols@suncoastfcu.org

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).

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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 Name: **VALIC**

Signature: Todd Buchanan Date: 11/19/12

Type Name: Todd Buchanan Title: _____

Telephone Number with Area Code: (813) 269-3320

FAX Number with Area Code: (813) 269 3370

E-Mail Address for General Company Contact: todd.buchanan@VALIC.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).

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

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

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: **WADDELL & REED**

Signature: Debra K. Schmidt Date: 11/15/12

Type Name: Debra K. Schmidt Title: Vice President

Telephone Number with Area Code: (913) 236-1517

FAX Number with Area Code: (913) 236-2552

E-Mail Address for General Company Contact: dschmidt@waddell.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).

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