

SAVANNAH-CHATHAM COUNTY BOARD OF EDUCATION REQUEST FOR PROPOSAL REGISTER
RFP 21-01 Audited
Supplemental Retirement Plans and Investment Management Services

RFP OPENING DATE & TIME: August 25, 2020 @ 2:00 P.M.

PRE-BID ATTENDANCE: NA

Note: __4__addenda issued on this project.

Offeror's Name	Document Signed Yes or No	LMWBE	Addendum Acknowledgement Yes or No	Copies Submitted
1. AIG Retirement Services 2929 Allen Parkway Houston, TX 77019 713-831-4336 phone 713-831-6161 fax	Y	Not stated	Y 1-4	Technical proposal Fee Structure
2. PenServ Plan Services, Inc. 102 Trade Zone Drive West Columbia, SC 29170 803-791-4923 phone 803-791-5925 fax	Y	N/W	Y 1-4	Technical proposal Fee Structure
3. Equitable Financial Life Insurance Co. 1290 Avenue of Americas New York, NY 10104 212-314-2014 phone 315-477-2830 fax	Y	N	Y 1-4	Technical proposal Fee Structure Prospectus Annual Financial Statement
4. Horace Mann Life Insurance Co. #1 Horace Mann Plaza Springfield, IL 62715 217-787-2500 phone 800-217-7351 fax	Y	Not stated	Y 1-4	Technical proposal Fee Structure
5. Life Insurance of the Southwest d/b/a National Life Group 15455 Dallas Parkway, Suite 800 Addison, TX 75001 214-722-9028 phone 214-638-9257 fax	Y	N	Y 1-4	Technical proposal Fee Structure Financial documentation
6. TSA Consulting Group, Inc. 15 Yacht Club Dr. NE Fort Walton Beach, FL 32548 850-244-7306 phone x1111 850-244-7308 fax	Y	N	Y 1-4	Technical Proposal Fee Structure

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7. Omni Financial Group, Inc. (U.S.OMNI) 220 Alexander Street, Suite 400 Rochester, NY 14607 877-544-6664 phone 585-436-3633 fax	Y	N	Y 1-4	Technical proposal Fee Structure
8. Voya Retirement Insurance and Annuity Co. 1 Orange Way Windsor, CT 06095 781-796-9797	N	M	N	Technical proposal Fee Structure

TABULATION PERFORMED BY: Joan Carter, Lead Purchasing Agent CERTIFIED BY: Katrina L. Hagan, Purchasing Agent

NUMBER OF RFPs EMAILED/FAXED: 6 TO LMWBE 1 A 1 W H S I L N M
NUMBER NOTIFIED BY GPR: 106 TO LMWBE A 27 AA 3 NA H 1 PI/A M 75 NC
NUMBER OF RFPs RECEIVED: 8 FROM LMWBE: 1 A W 1 H S I L N M

KEY: DISTRICT MINORITY DESIGNATIONS:
A=AFRICAN AMERICAN, W=WOMAN, H=HISPANIC, S=ASIAN AMERICAN, I=AMERICAN INDIAN, L=LOCAL, N=NON-LOCAL, M=MAJORITY

KEY: GPR MINORITY DESIGNATIONS:
A=AFRICAN AMERICAN, AA=ASIAN AMERICAN, NA=NATIVE AMERICAN, H=HISPANIC/LATINO, PI/A= PACIFIC ISLAND/AMERICAN, M =NON-MINORITY, NC=NOT CLASSIFIED