



# District School Board of Pasco County

20430 Gator Lane • Land O' Lakes, Florida 34638 • 813/ 794-2221

Heather Fiorentino, Superintendent

[www.pasco.k12.fl.us](http://www.pasco.k12.fl.us)

Department of Purchasing  
Kendra Goodman, CPPO, CPPB, Purchasing Agent  
813/ 794-2221 Fax: 813/ 794-2111  
727/ 774-2221 TDD: 813/ 794-2484  
352/ 524-2221 e-mail: [kgoodman@pasco.k12.fl.us](mailto:kgoodman@pasco.k12.fl.us)

October 19, 2010

## MEMORANDUM

**TO:** Honorable School Board Members

**FROM:** Kendra Goodman, CPPO, CPPB, Purchasing Agent 

**SUBJECT:** Fourth-Year Renewal of Five-Year Agreement  
RFP 08-006-AZ, Voluntary Investment Products

On November 3, 2009, official action (attached) was taken to renew the above-referenced RFP for voluntary investment products to ten (10) separate providers, as follows:

Ameriprise Financial Services	Lincoln Investment Planning
AXA Equitable	MetLife Resources
Horace Mann	Suncoast Federal Credit Union (Members Trust)
ING	Valic
The Legend Group	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 third-year term will expire on December 31, 2010.

Per the terms of the RFP, all firms must maintain a minimum of 75 active participant contracts per calendar year in order to retain their payroll slot. Services from all firms noted above have been satisfactory. Ms. Mary Tillman, Director of Employee Benefits, Assistance & Risk Management, has requested renewal of the RFP for the term January 1, 2011 – December 31, 2011 with these companies. Accordingly, the firms were contacted to determine their willingness to enter into the fourth year of the RFP, under existing terms and conditions. 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.

The RFP is a five-year contract, renewable annually at the mutual agreement of the parties. We are recommending renewal of this RFP for the fourth-year term with the companies noted above. Should you have any questions or concerns, please contact Mary Tillman or me at your earliest convenience.

KDG/az  
Attachments

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District Wide Accreditation • Southern Association of Colleges and Schools

Date/Time: October 13, 2010 11:54:00



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

✓  
 Yes, I agree to renew the above-referenced RFP, under existing terms and conditions, with the District School Board of Pasco County. The term will be January 1, 2010 - December 31, 2011. Invoicing by the Employee Benefits, Assistance & Risk Management Dept. will follow separately, after Board approval of the renewal.  
 No, I do not agree to renew the above-referenced RFP with the District School Board of Pasco County.

**COMPANY NAME:** Ameriprise Financial Services

SIGNATURE: Cheryl M. Burbano DATE: 9/02/10

PRINTED NAME/TITLE: Senior Advisor E-MAIL: cheryl.m.burbano@ampf.com

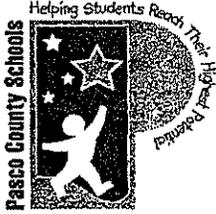
TELEPHONE W/AREA CODE: 813-994-1150 FAX W/AREA CODE: 813-954-1331

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**PLEASE RETURN TO:**  
**DISTRICT SCHOOL BOARD OF PASCO COUNTY**  
**ATTENTION: ARLENE ZIMNEY, CPPB, C.P.M., BUYER**  
**PURCHASING DEPARTMENT**  
 20430 GATOR LANE, LAND O' LAKES, FL 34638  
 (813) 794-2504 (PHONE)  
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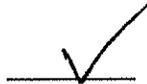
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**COMPANY NAME:** AXA Equitable

**SIGNATURE:** *Jennifer Wong-Hernandez* **DATE:** 9/3/2010  
**PRINTED NAME/TITLE:** Jennifer Wong-Hernandez **E-MAIL:** jennifer.wong-hernandez@axa-equitable.com  
AVP

**TELEPHONE W/AREA CODE:** 201 583 2216 **FAX W/AREA CODE:** 201 583 2048

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COMPANY NAME: Horace Mann

SIGNATURE: Tricia Seifert DATE: 9/8/10

PRINTED NAME/TITLE: Tricia Seifert / AVP E-MAIL: tricia.seifert@horacemana.com

TELEPHONE W/AREA CODE: 866-999-1945, option 1 FAX W/AREA CODE: 800-217-7351

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COMPANY NAME: ING

SIGNATURE: [Signature] DATE: 9/29/10

PRINTED NAME/TITLE: Kasi Boyles - Manager E-MAIL: Kasi.boyles@us-ing.com

TELEPHONE W/AREA CODE: 813-281-3791 FAX W/AREA CODE: 860-580-0108

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COMPANY NAME: The Legend Group

SIGNATURE: \_\_\_\_\_

DATE: 9-27-2010

PRINTED NAME/TITLE: Cynthia Kleymann

E-MAIL: adserv403b@legendgroup.com

TELEPHONE W/AREA CODE: 201-694-0110

FAX W/AREA CODE: ckleymann@legendgroup.com

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\_\_\_\_\_

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COMPANY NAME: MetLife Resources

SIGNATURE: Octavio Santos DATE: 9/3/10

PRINTED NAME/TITLE: OCTAVIO SANTOS JR. RMD E-MAIL: osantos@metlife.com

TELEPHONE W/AREA CODE: 407-333-3078 FAX W/AREA CODE: 407-333-3346  
X 13

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COMPANY NAME: Suncoast Federal Credit Union (Members Trust)

SIGNATURE: *Roy Echols* DATE: 9-2-10

PRINTED NAME/TITLE: ROY Echols, Vice President E-MAIL: roy.echols@suncoastfcu.org

TELEPHONE W/AREA CODE: (813) 246-5211 x.86727 FAX W/AREA CODE: 866-409-4478

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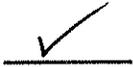
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COMPANY NAME: Valic

SIGNATURE: [Handwritten Signature] DATE: 9-2-10

PRINTED NAME/TITLE: Todd M. Gutman E-MAIL: todd.gutman@VALIC.com

TELEPHONE W/AREA CODE: 813-269-3362 FAX W/AREA CODE: 813-269-3380

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Vendor shall comply with all applicable laws, ordinances, codes and statutes of any and all local, state, or national governing bodies included within this section. Vendor shall comply with the regulations of the Civil Rights Act of 1964, in which no person in the United States shall on the grounds of race, creed, color, or national origin be excluded from participation in or be denied the proceeds of, or be subject to discrimination in the performance of this contract.

**PLEASE RETURN TO:**  
**DISTRICT SCHOOL BOARD OF PASCO COUNTY**  
**ATTENTION: ARLENE ZIMNEY, CPPB, C.P.M., BUYER**  
**PURCHASING DEPARTMENT**  
20430 GATOR LANE, LAND O' LAKES, FL 34638  
(813) 794-2504 (PHONE)  
(813) 794-2111 (FAX)  
[azimney@pasco.k12.fl.us](mailto:azimney@pasco.k12.fl.us)



# District School Board of Pasco County

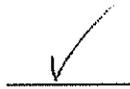
20430 Gator Lane • Land O' Lakes, Florida 34638 • 813/794-2221

Heather Fiorentino, Superintendent

[www.pasco.k12.fl.us](http://www.pasco.k12.fl.us)

Department of Purchasing  
Kendra Goodman, CPPO, CPPB, Purchasing Agent  
813/ 794-2221 Fax: 813/ 794-2111  
727/ 774-2221 TDD: 813/ 794-2484  
352/ 524-2221 e-mail: [kgoodman@pasco.k12.fl.us](mailto:kgoodman@pasco.k12.fl.us)

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



Yes, I agree to renew the above-referenced RFP, under existing terms and conditions, with the District School Board of Pasco County. The term will be January 1, 2010 - December 31, 2011. Invoicing by the Employee Benefits, Assistance & Risk Management Dept. will follow separately, after Board approval of the renewal.

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

**COMPANY NAME:** Waddell & Reed Inc.

SIGNATURE: Debra K Schmidt DATE: 9/7/10

PRINTED NAME/TITLE: Debra K Schmidt E-MAIL: dschmidt@waddell.com  
Vice President

TELEPHONE W/AREA CODE: (913) 236-1517 FAX W/AREA CODE: (913) 236-2552

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# District School Board of Pasco County

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November 3, 2009

## MEMORANDUM

**TO:** Honorable School Board Members

**FROM:** Kendra Goodman, CPPB, Purchasing Agent *KDG*

**SUBJECT:** Third-Year Renewal of Five-Year Agreement  
RFP 08-006-AZ, Voluntary Investment Products

On December 16, 2008, official action (attached) was taken to renew the above-referenced RFP for voluntary investment products to ten (10) separate providers, as follows:

Ameriprise Financial Services  
AXA Equitable  
HoraceMann  
ING  
The Legend Group

Lincoln Investment Planning  
MetLife Resources  
Suncoast Federal Credit Union  
Valic  
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 second-year term will expire on December 31, 2009.

Per the terms of the RFP, all firms must maintain a minimum of 75 active participant contracts per calendar year in order to retain their payroll slot. Services from all firms noted above have been satisfactory. Ms. Mary Tillman, Director of Employee Benefits, Assistance & Risk Management (EBARM) has requested renewal of the RFP for the term January 1, 2010 – December 31, 2010 with the companies noted above. Please see her memo, attached, for further information.

These firms were contacted to determine their willingness to enter into the third year of the RFP, under existing terms and conditions. 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. The RFP is a five-year contract, renewable annually at the mutual agreement of the parties. We are recommending renewal of this RFP for the third-year term with the companies noted above. Should you have any questions or concerns, please contact Ms. Tillman or me at your earliest convenience.

KDG/az  
Attachments

