HARFORD COUNTY PUBLIC SCHOOLS
PURCHASING RFP REPORT

RFP #:	16-BTW-007
RFP Title:	Recordkeeping, Investment, Comms, and Admin. Services for 403(b) and 475 (b) plans
Date RFP Responses Due:	August 3rd, 2018
Date of Bid Advertisement:	July 20th, 2017
Advertising Method:	eMaryland Marketplace and HCPS Website

DESCRIPTION OF RFP:	Service Provider for Recordkeeping, Investment, Communications, and Administrative Services for the 403 (b) and 457 (b) Plans

BID TABULATION

BIDDERS

THE OMNI GROUP
EMPOWER RETIREMENT
MASS MUTAL
AXA EQUITABLE LIFE INS. CO.
LINCOLN FINANCIAL
TCG ADMINISTRATORS
VOYA FINANCIAL
VALIC
HORACE MANN CO.

CONTRACT AWARDED TO:

LINCOLN FINANCIAL

ESTIMATED VALUE OF CONTRACT:

Unknown- based on services used

Contract Terms: 5 years

Contract Start Date: September 24, 2018

METHOD OF AWARD: ☐ Individual Items ☐ Group ☒ Total Bid

APPROVALS:

BUYER: _____
Signature Date

SUPERVISOR OF PURCHASING: Bruce Walker 11/9/2018
Signature Date

Revision 3/5/13