



# 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, 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)  
November 22, 2005

## MEMORANDUM

**TO:** Honorable Board Members

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

**RE:** Fifth Year Renewal of Five-Year Contract  
RFP #02-049 – 403(b) Retirement Services

On November 16, 2004, official action (attached) was taken to award the above-referenced RFP to the companies noted below. The scope of the RFP is for voluntary 403(b) retirement services. Essentially, the companies provide marketing, education, and administrative services with regard to the District's IRS 403(b) tax-deferred investment program. As part of the RFP, proposers are required to share equally in the total annual fee of \$35,000 to support the program's administration.

Currently, the companies listed below have submitted their intent to renew, as well as to contribute their share of the participation fee (\$3,888.88 each). The fourth year of the contract expires December 31, 2005. The fifth-year renewal is for the term January 1 – December 31, 2006. The companies participating are:

AIG Valic Financial Advisors	The Legend Group
Ameriprise Financial (formerly American Express)	Members Trust Company
The Horace Mann Companies	MetLife Resources
ING	Waddell & Reed Financial Serv.
ING Financial Advisors LLC	

At this time, it is my recommendation to enter into the fifth year of the agreement with the vendors noted above. Should you have any questions regarding this matter, or if I can be of further assistance, please feel free to contact Mary Tillman, Director of EBARM, or me at your earliest convenience.

KDG/az  
Attachment