

April 12, 2024

ADDENDUM #1

TO THE

SOLICITATION DOCUMENTS

FOR RFP-2024-13

RETIREMENT PLAN RECORDKEEPING AND TRUST SERVICES

Clarifications, amendments, additions and/or deletions to the plans and specifications are hereby incorporated as follows:

Additions

None

Amendments:

The maximum number of pages allowed for response to each Scope of Work section is amended to the following

SECTION TITLE	RESPONSE PAGES ALLOWED
Organization and History	4 pages
Client Service / Quality Assurance	7 pages
Recordkepping/Administration	6 pages
Regulatory Services	3 pages
Loans	2 pages
Reporting	2 page; include formatted report as attachment
Participant Experience and Service	5 pages
Communication and Education	3 pages
Conversion (for existing plans) – if new vendor	1 pages
Systems Capabilities and Hardware	2 page
Cybersecurity	5 pages



DHA is a Fair Housing and Equal Opportunity Agency.

DHA does not discriminate on the basis of disability status in admission or access to its federally assisted programs and activities. Persons with disabilities have the right to request reasonable accommodations. DHA's Disability Rights Coordinator coordinates compliance with the nondiscrimination requirements contained in HUD's regulations: DHA Disability Rights Coordinator, 3939 North Hampton Rd, Dallas, TX 75212; 469-965-1961 or TTY 711.

Investments (Note: any related materials may be included as attachments)	4 pages
Trustee Services	2 pages
Integrated Plans and Programs	1 page
References	2 pages
Expenses	3 pages
Fees	1 page

Please note that it is acceptable to provide additional information and supporting documentation as a referenced attachment.

Clarifications:

None

