

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
Recordkeeping/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

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

