

Attachment A

Mandatory Qualification Certification and Questionnaire

Request for Proposal Number 5989 Z1

All bidders are required to complete this attachment.

The bidder hereby certifies that it meets all of the following mandatory qualifications:

1. As of December 31, 2018, the bidder has a minimum of three (3) public pension fund clients.

____ Yes. ____ No.

2. The bidder has a minimum of five (5) years of experience in providing actuarial consulting services to a public pension fund. This means that the bidder as an organization has been providing actuarial consulting services to a public pension fund for at least five (5) years. This requirement is not satisfied simply because its employees have at least five (5) years' experience in providing actuarial consulting services to a public pension fund.

____ Yes. ____ No.

3. The bidder's lead consultant on the account must have a minimum of ten (10) years of experience in providing actuarial consulting service to public pension funds. This experience shall include general consulting, experience analysis, and valuation assignments for such funds. This person shall also have experience in testifying before legislative and administrative bodies in support of actuarial positions and the principles used in valuing a public retirement system or pricing legislation, and an ability to discuss in laymen's terms the following: actuarial theory; basis for assumptions; and other actuarial matters. The lead consultant must be a member of the American Academy of Actuaries.

____ Yes. ____ No.

4. Professional staff assigned to the account shall have a minimum of five (5) years of experience in the field of actuarial science and will include persons with appropriate professional credentials such as Fellow or Associate of Society of Actuaries, and/or Fellow of the Conference of Actuaries in Public Practice, and/or Member of the American Academy of Actuaries, and/or meet standards of a qualified actuary under the provisions of the Employee Retirement Income Security Act of 1974.

____ Yes. ____ No.

5. All services to be provided on behalf of the account shall be in accordance with generally accepted actuarial principles.

____ Yes. ____ No.

6. The actuarial firm must carry liability insurance as set forth in this RFP for the duration the contract. (Section III, G Insurance Requirements)

____ Yes. ____ No.

Date

Name of firm

Name and title of individual signing for the firm.

Signature