

**RFP / TITLE****CONTACT****EMAIL****PHONE NUMBER****SUBMITTAL DUE DATE****Q&A ISSUE DATE****QUESTIONS & RESPONSES #04****071876 Consultant Services for Deferred Compensation Plan****Axa Turney, Contract and Procurement Analyst**[procurement@portoftacoma.com](mailto:procurement@portoftacoma.com)**253-888-4768****APR 21, 2023 @ 2:00 PM (PDT)****APR 7, 2023**

#	Question	Answer	Question #
1	What is the reason for issuing the RFP?	Current contract expires at end of June	Email
2	Will Hyas Group be eligible to rebid?	Yes	Email
3	Why is the search being conducted at this time?	See question 1	Email
4	Is Hyas the current consultant? if so, are they welcome to rebid?	Yes, Hyas is current consultant. They will be able to rebid.	Email
5	Can you please provide a copy of your investment manager roster and investment policy statement?	Investment manger roster is through the current vendor. Please see addendum 01 for the investement policy statement	Q-001674
6	How many investment manager searches have been conducted each year, over the last 3 years?	None	Q-001674
7	We understand that the selected consultant must attend semi-annual employer meetings to review the fund lineup. Will these meetings be held in person or virtually?	Meetings are anticipated to be in-person.	Q-001674
8	Are there any other regular meetings the consultant will be required to attend?	No	Q-001674
9	Can you please provide a copy of the investment fund lineup for the Plans?	Yes. Please see addendum 02	Q-001677
10	Can you please provide the name of the current third-party administrator?	IMCA-RC (now MissionSquare) is the current third party administrator	Q-001677
11	Do you currently have a retirement plan consultant that is under contract?	Please see question 4	Q-001688
12	If so, could you advise who that firm is?	Please see question 4	Q-001688
13	If not, what has prompted you to hire one now?	Please see question 1	Q-001688
14	Do you have a current Investment Policy Statement (IPS)? If so, please provide.	Please see addendum 01 for investment policy statement	Q-001688
15	Who is the current provider(s)/record-keeper(s) on the 457(b), 401(a), and RHS Plans?	Please see question 10	Q-001688
16	Could you provide a breakdown of the assets for the 457(b), 401(a), and RHS Plans?	Please see attachment D in RFP 071876	Q-001688
17	Could you provide the fund lineup(s) for the 457(b), 401(a), and RHS Plans?	Please see addendum 02 for fund lineups	Q-001688
18	Could you provide the Annual Plan Review for the 457(b), 401(a), and RHS Plans? Or a consolidated one.	No	Q-001688
19	Could you provide a copy of the plan documents and administrative service agreements?	No	Q-001688
20	Are you looking for quarterly due diligence review meetings?	See RFP for meeting requirements	Q-001688
21	If so, are you looking for those meetings to be in person, virtually, or a combination?	Please see question 7	Q-001688
22	And lastly, is the Port of Tacoma/Northwest Seaport Alliance paying for retirement consulting services? Or is it being built into the plan expenses?	It is built into the plan expenses.	Q-001688