

	State of South Carolina South Carolina Public Employee Benefit Authority	Solicitation Number: PEBA0292020 Date Issued: 02/22/2021 Procurement Officer: Georgia Gillens, CPPO, CPPB Phone: 803.734.0010 Email Address: ggillens@peba.sc.gov
	Request for Proposal Amendment 2	

DESCRIPTION: Recordkeeping/administration, communication/education, custodial trustee, investment management, and related services for Health Savings Accounts for S.C. PEBA

SUBMIT OFFER BY (Opening Date/Time): 03/12/2021 3:00 PM

The Term "Offer" Means Your "Proposal". Your offer must be submitted in a sealed package. The Solicitation Number & Opening Date should appear on the package exterior. See the clause entitled "Submitting Your Offer or Modification."

SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:

MAILING ADDRESS: South Carolina Public Employee Benefit Authority P.O. Box 11960 Columbia, S.C. 29211-1960 Attention: Georgia Gillens	PHYSICAL ADDRESS: South Carolina Public Employee Benefit Authority 202 Arbor Lake Drive Columbia, S.C. 29223 Attention: Georgia Gillens
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AWARD & AMENDMENTS	Award will be posted on 04/16/2021 . The award, this solicitation, any amendments, and any related notices will be posted at the following web address: https://procurement.sc.gov/vendor/contract-opps/other-solicitations/peba
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You must submit a signed copy of this form with Your Offer. By submitting a proposal, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of one hundred twenty (120) calendar days after the Opening Date. (See the clause entitled "Signing Your Offer.")

NAME OF OFFEROR <small>(Full legal name of business submitting the offer)</small>		Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.
AUTHORIZED SIGNATURE <small>(Person must be authorized to submit binding offer to contract on behalf of Offeror.)</small>		
TITLE <small>(Business title of person signing above)</small>		STATE VENDOR NO. <small>(Register to obtain S.C. Vendor No. at www.procurement.sc.gov)</small>
PRINTED NAME <small>(Printed name of person signing above)</small>	DATE SIGNED	STATE OF INCORPORATION <small>(If you are a corporation, identify the state of incorporation.)</small>

OFFEROR'S TYPE OF ENTITY: (Check one) <small>(See "Signing Your Offer" provision.)</small>	
<input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Partnership <input type="checkbox"/> Other _____	
<input type="checkbox"/> Corporate entity (not tax-exempt) <input type="checkbox"/> Corporation (tax-exempt) <input type="checkbox"/> Government entity (federal, state, or local)	

PAGE TWO
(Return Page Two with Your Offer)

HOME OFFICE ADDRESS (Address for offeror's home office / principal place of business)	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.) _____ Area Code - Number - Extension Facsimile _____ E-mail Address _____
PAYMENT ADDRESS (Address to which payments will be sent.) ____ Payment Address same as Home Office Address ____ Payment Address same as Notice Address (check only one)	ORDER ADDRESS (Address to which purchase orders will be sent) ____ Order Address same as Home Office Address ____ Order Address same as Notice Address (check only one)

ACKNOWLEDGMENT OF AMENDMENTS Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See the clause entitled "Amendments to Solicitation")							
Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date
DISCOUNT FOR PROMPT PAYMENT (See the clause entitled "Discount for Prompt Payment")		10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	_____ Calendar Days (%)		

AMENDMENT #2

REQUEST FOR PROPOSAL – PEBA0292020

Recordkeeping/administration, communication/education, custodial trustee, investment management, and related services for Health Savings Accounts for S.C. PEBA

PLEASE NOTE: The original Request for Proposal document has been superseded and has been replaced in its entirety by Amendment 1. Amendment 2 is being issued to update the Schedule of Key Dates and remove the requirement for monthly reports by payroll centers. It is recommended that Offerors, discard all superseded documents as described above and refer and respond only to the solicitation as described in Amendment 1 and Amendment 2. Attachment 11 includes responses to follow-up questions submitted in writing by the deadline. Any changes agreed to as a result of Attachment 11, Q&A have been incorporated into Amendment 2. The questions and answers submitted in writing by the deadline are included as an attachment for information only. Only the changes incorporated in Amendment 1 and Amendment 2 are relevant.

The deadline for questions has passed.

AMENDMENTS TO SOLICITATION (JAN 2004)

- (a) The Solicitation may be amended at any time prior to opening. All actual and prospective Offeror's should monitor the following web site for the issuance of Amendments: www.procurement.sc.gov
- (b) Offeror's shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or is amended, then all terms and conditions which are not modified remain unchanged. [02-2A005-1

Remove the following requirement:

Amendment 1, Page 26, Item 5

- A monthly report that reflects administrative fees received by payroll center.

All other terms and conditions remain unchanged.

REQUEST FOR PROPOSAL (RFP)
SOLICITATION NUMBER PEBA0292020

RECORDKEEPING/ADMINISTRATION, COMMUNICATION/EDUCATION, CUSTODIAL TRUSTEE,
INVESTMENT MANAGEMENT, AND RELATED SERVICES FOR HEALTH SAVINGS ACCOUNTS
FOR S.C. PEBA

SCHEDULE OF KEY DATES IN THE PROPOSAL PROCESS

All dates subject to change

1. Distribution of the Request for Proposal	12/02/2020
2. Questions on the RFP (10 a.m.)	12/18/2020
3. a. Pre-Proposal Conference b. Final Deadline for Submission of All Questions	1/15/2021
4. State's Written Responses to Questions (tentative)	2/5/2021
5. Follow-up Questions on Amendment 1 (4 p.m.)	2/09/2021
6. Submission and Opening of Proposals (3 p.m.)	3/12/2021
7. Notice of Intent to Award Posting Date (tentative)	4/12/2021
8. Notice of Intent to Award Becomes Official/Final Statement of Award (tentative)	4/21/2021
9. Contract Performance	1/1/2022