

	State of South Carolina South Carolina Public Employee Benefit Authority Request For Proposal Amendment 1	Solicitation Number: PEBA0392023 Date Issued: 01/25/2024 Procurement Officer: Georgia Gillens, CPPO, CPPB, NIGP-CPP Phone: 803.734.0010 Email Address: GGillens@peba.sc.gov

DESCRIPTION: Provide Recordkeeping/Administration, Communication/Education, Custodial Trustee Services and Investment Management Services for SC PEBA's Deferred Compensation Program

SUBMIT OFFER BY (Opening Date/Time): 03/18/2024 11:00 AM

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, CPPO, CPPB	PHYSICAL ADDRESS: South Carolina Public Employee Benefit Authority 202 Arbor Lake Drive Columbia, S.C. 29223 Attention: Georgia Gillens, CPPO, CPPB
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AWARD & AMENDMENTS	Award will be posted on 04/11/2024 . 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.) <hr/> Area Code - Number - Extension Facsimile <hr/> E-mail Address
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PAYMENT ADDRESS (Address to which payments will be sent.) <hr/> ___ 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) <hr/> ___ Order Address same as Home Office Address ___ Order Address same as Notice Address (check only one)
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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 (%)
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REQUEST FOR PROPOSAL – PEBA0392023

Provide Recordkeeping/Administration, Communication/Education, Custodial Trustee Services and Investment Management Services for SC PEBA’s Deferred Compensation Program

PLEASE NOTE: The original Request for Proposal document stands as written with one exception below notating a change to the date of the pre-proposal meeting. Only the changes incorporated in Amendment 1 are relevant.

See page 7 Schedule of Key Dates in the Procurement Process

SCHEDULE OF KEY DATES IN THE PROPOSAL PROCESS

All dates subject to change

1. Distribution of the RFP	01/23/2024
2. Questions on the RFP 12:00 PM	01/30/2024
3. Pre-Proposal Conference 10:00 AM	02/12/2024
4. PEBA’s Written Responses to Questions Questions/Amendment Issue (tentative)	02/26/2024
5. Submission and Opening of Proposals (11:00 a.m.)	03/18/2024
6. Intent to Award Posting Date	04/11/2024
7. Intent to Award Becomes Official (tentative)	04/23/2025
8. Contract Performance	01/01/2025

Replace with

SCHEDULE OF KEY DATES IN THE PROPOSAL PROCESS

All dates subject to change

1. Distribution of the RFP	01/23/2024
2. Questions on the RFP 12:00 PM	01/30/2024
3. Pre-Proposal Conference 10:00 AM	02/13/2024
4. PEBA's Written Responses to Questions Questions/Amendment Issue (tentative)	02/26/2024
9. Submission and Opening of Proposals (11:00 a.m.)	03/18/2024
10. Intent to Award Posting Date	04/11/2024
11. Intent to Award Becomes Official (tentative)	04/23/2025
12. Contract Performance	01/01/2025

1.2 AMENDMENTS TO SOLICITATION: (a) The solicitation may be amended at any time prior to opening. All amendments to this solicitation shall be in writing from the South Carolina Public Employee Benefit Authority ("PEBA"). PEBA shall not be legally bound by any amendment which is not in writing. All actual and prospective Offerors should monitor the following website for the issuance of amendments: <https://www.procurement.sc.gov/doing-biz/bid-ops/peba> (b) Offerors 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 acknowledging receipt in the Offeror's Executive Summary, (4) by letter, or (5) by submitting a proposal that indicates in some way that the Offeror received the amendment. (c) If this solicitation is amended, then all terms and conditions which are not modified by the amendment(s) remain unchanged.

All other terms and conditions remain unchanged.