

REQUEST FOR QUALIFICATIONS (RFQ)  
BRICK TOWNSHIP BOARD OF EDUCATION  
BRICK, NEW JERSEY

The purpose of this request is to solicit qualifications for Deferred Compensation (403(b)/ 457) providers.

All submissions should include the following minimum information:

1. Number of years company has been in business.
2. Number of school districts in New Jersey for which company provides services.
3. Gross assets managed.
4. Additional services offered to district employees (for example, long-term care insurance, financial planning, mortgage and loan services, etc.).
5. Annual dollar amount, per participant, provided to the Brick Township Board of Education for reimbursement of district costs to administer plan (\$12 per participant minimum).

Companies must be willing to agree to the following:

1. Sign sharing agreement.
2. Sign Plan Document.
3. Sign hold harmless agreement.
4. Take part in annual employee information sharing sessions for staff at beginning of school year or at other times as requested by the Board of Education.
5. Limitation of two visits per building per year for access to district staff.

Submission Information:

All responses to this Request for Qualifications (RFQ):

1. Will be opened publicly at the Brick Township Board of Education, 101 Hendrickson Avenue, Brick, New Jersey 08724 commencing at 10:00 a.m. prevailing time, on September 17, 2008.
2. Must be enclosed in a sealed envelope bearing the name and address of the submitter, the name of this RFQ, and the RFQ due date, on the outside of the envelope.
3. Responses to this RFQ which will be hand delivered on the day of opening, must be taken and presented to the School Business Administrator at the time the responses to this RFQ are called for.
4. Responses to this RFQ which are mailed shall be mailed to:  
Mr. James W. Edwards, Jr., CPA, School Business Administrator  
Brick Township Board of Education

101 Hendrickson Avenue  
Brick, NJ 08724

and must be received prior to 10:00 a.m., prevailing time on the date on which they are to be opened.

5. An original and three (3) copies of response to this RFQ must be submitted for response to be deemed complete.

**Question and Answer Session:**

The Brick Township Board of Education will hold a question and answer session to address questions from interested providers. Questions are required to be provided in writing in advance of the Question and Answer session to:

James W. Edwards, Jr., CPA  
Brick Township Board of Education  
101 Hendrickson Avenue  
Brick, NJ 08724

Questions are due by September 8, 2008.

The Question and Answer session will be held at 10:00 a.m. on September 10, 2008, at:

Brick Township Board of Education  
101 Hendrickson Avenue  
Brick, NJ 08724

**Award:**

The Brick Township Board of Education will limit its' award to six (6) providers.