



# ALLEGHENY COUNTY EMPLOYEES' RETIREMENT SYSTEM

## Inquiry

Project Name: Employee Financial Wellness  
Solicitation No.: EFW2016  
Date Posted: March 3, 2016  
Submission Deadline: **March 25, 2016 3:00 PM**

Contact: Carol Uminski, Plan Administrator  
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All proposals and other communications must be addressed to:  
Allegheny County Employee's Retirement System  
106 County Office Building  
542 Forbes Avenue  
Pittsburgh, PA 15219  
ATTENTION: Carol D. Uminski

### I. Introduction

The Allegheny County Employee's Retirement System ("ACERS") is seeking proposals from qualified firms to provide Employee Financial Wellness services to current employees of Allegheny County.

### II. Scope of Services

ACERS is requesting the following services:

- Provide up to 8 workshops and seminars and attend an additional 8 meetings for introduction of services as follows;  
Social Security, Medicare, Elder Care, Retirement Planning, Income Tax Planning, Cash Flow Analysis, Budgeting, Personal Insurance and Risk Transfer, Identity Theft, Education Funding, Debt Analysis.
- Provide a Gap Analysis written report for an employee upon request. Please provide a SAMPLE report with your response.
- Proposer must have previous experience in performing services similar to those requested herein.
- ACERS prefers that the presenters of these workshops/seminars be employees of the firm and not outsourced to a third party.
- Proposer shall demonstrate their ability to provide the staffing resources for the timely and efficient implementation of requested services.
- Please provide office locations located within Allegheny County that employees can visit to receive financial guidance if requested.
- Proposer need be available with reasonable notice to meet and present to ACERS.

### III. Financial Agreements

Please provide SAMPLE agreements that ACERS would be required to implement should your firm be selected for these services.

### IV. Fee Proposal

Proposers are to submit a Fee Proposal.