



Accounting, Actuarial & Legal Service Provider Checklist

We have developed this checklist as a reference prior to sending procurement packets to PERAC.
Please use as a guide to assist you with the documents required for non-investment related service providers.
This checklist can be used for new hires as well as rehires.

1

General Information:

Board -	<input type="text"/>
Date Received -	<input type="text"/>
Service Provider -	<input type="text"/>

2

✓ Vendor Checklist:

Please submit required forms to retirement board.

<input type="checkbox"/>	1. Vendor Contact Information Form
<input type="checkbox"/>	2. Vendor Certification
<input type="checkbox"/>	3. Vendor Disclosures Form

3

✓ Retirement Board Checklist:

Board members must complete required forms in PROSPER.

<input type="checkbox"/>	1. Retirement Board Procurement Compliance Certification <i>(Complete in PROSPER)</i>
<input type="checkbox"/>	2. Retirement Board Member Certification <i>(Complete in PROSPER. One for each board member)</i>

4

This procurement package is for a (check one)

New Hire

Rehire

NOTE TO RETIREMENT BOARDS:

Please ensure all required documentation listed above is complete prior to submitting your procurement package to PERAC.