



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 -

Date Received -

Service Provider -

2

✓ Vendor Checklist:

Please submit required forms to retirement board.

1. Vendor Contact Information Form

2. Vendor Certification

3. Vendor Disclosures Form

3

✓ Retirement Board Checklist:

Board members must complete required forms in PROSPER.

1. Retirement Board Procurement Compliance Certification
(Complete in PROSPER)

2. Retirement Board Member Certification
(Complete in PROSPER. One for each board member)

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.