



# Consultant 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 consultants. This checklist can be used for new hires as well as rehires.

**1**

## General Information:

<b>Board -</b>	<input type="text"/>
<b>Date Received -</b>	<input type="text"/>
<b>Consultant -</b>	<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
<input type="checkbox"/>	4. Placement Agent Statement <i>(Please include all attachments)</i>
<input type="checkbox"/>	5. Retirement Board Evaluation Materials

**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 Evaluation Materials
<input type="checkbox"/>	3. 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.