



Consultant Checklist

We have developed this checklist as a reference prior to submitting procurement packets to PERAC via PROSPER. 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:

Retirement Board:

Date Received:

Consultant:

2. Vendor Checklist: Please submit required forms to Retirement Board.

- 1. Vendor Contact Information Form
- 2. Vendor Certification
- 3. Vendor Disclosure Form
- 4. Placement Agent Statement *(Please include all attachments)*

3. Retirement Board Checklist: Board must complete in PROSPER.

- 1. Attach all vendor provided forms listed above
- 2. Retirement Board Evaluation Materials *(Please attach)*
- 3. Retirement Board Procurement Compliance Certification *(Electronic signature required by Chair)*
- 4. Retirement Board Member Certification *(Electronic signature required by 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.