



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:

Board -
Date Received -
Consultant -

2

✓ Vendor Checklist:

Please submit required forms to retirement board.

1. Vendor Contact Information Form
2. Vendor Certification
3. Vendor Disclosures Form
4. Placement Agent Statement
(Please include all attachments)
5. Retirement Board Evaluation Materials

3

✓ Retirement Board Checklist:

Board members must complete required forms in PROSPER.

1. Retirement Board Procurement Compliance Certification
(Complete in PROSPER)
2. Retirement Board Evaluation Materials
3. 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.