



PROSPER UPDATES

Member-Compliance



PERAC Real-time Online Self-service
Environment for Regulation

COMPLIANCE, DISABILITY, 91A/WAGEMATCH

WINTER 2019

Benefits

Ease of Use

- Self-Service Portals
 - Self service reduces errors, handoffs and rework
- Easy to submit electronic information
- More visibility to whole process

Continuous Feedback

- Reminders for items that are due
- Notification that submission has occurred
- Instant status updates when forms are processed
- Form validation occurs on interactive form entry
- Interactive forms can have help tips

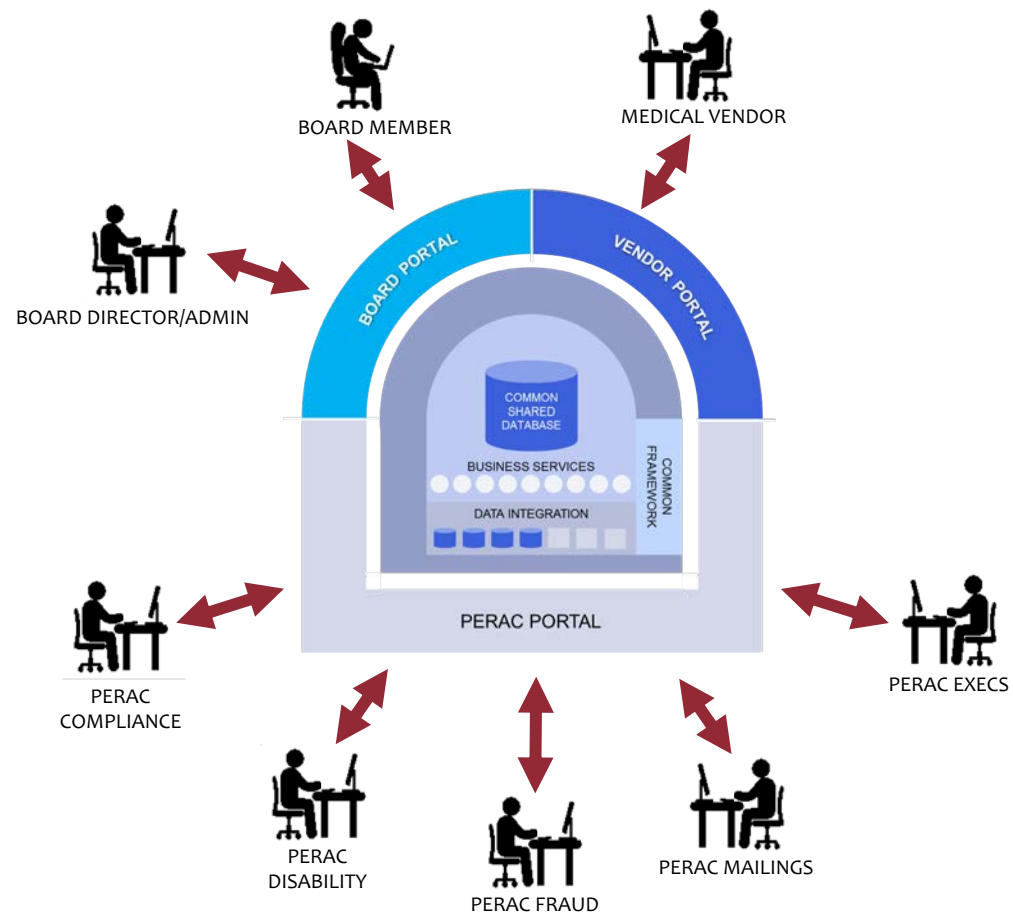
Access

- 24/7
- List all PERAC Memos

Security

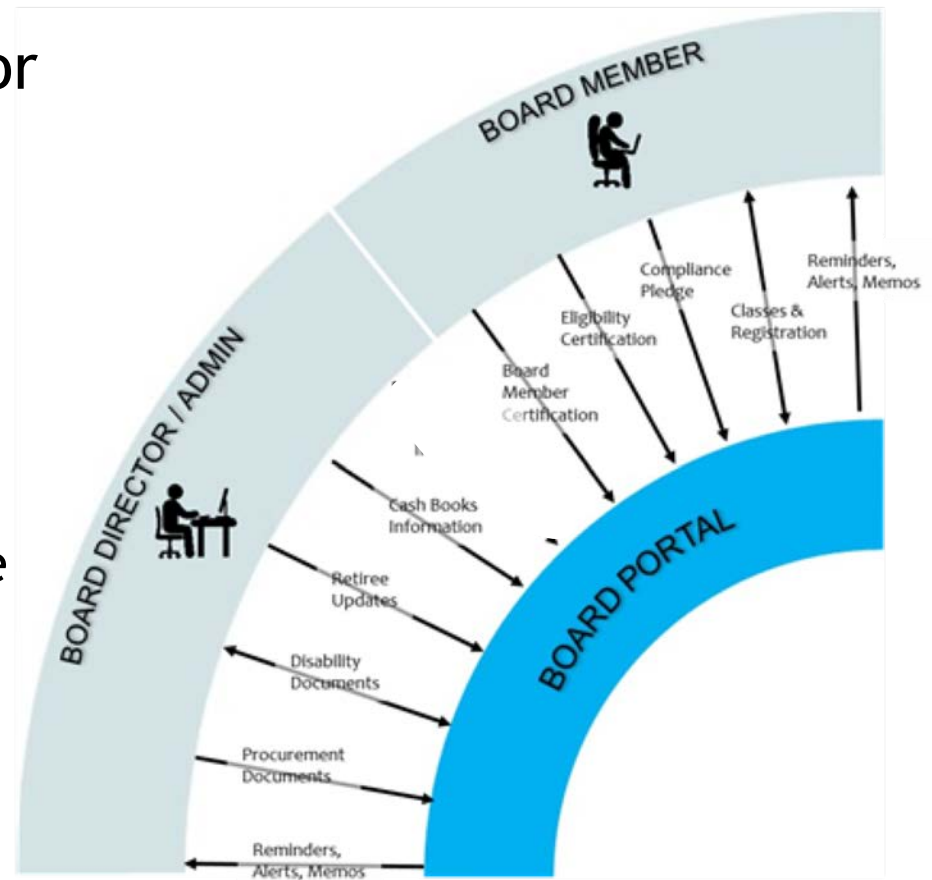
- Secure communication with PERAC
- Access to users based on roles (Admin, staff, Board member, Board chair)

Overview



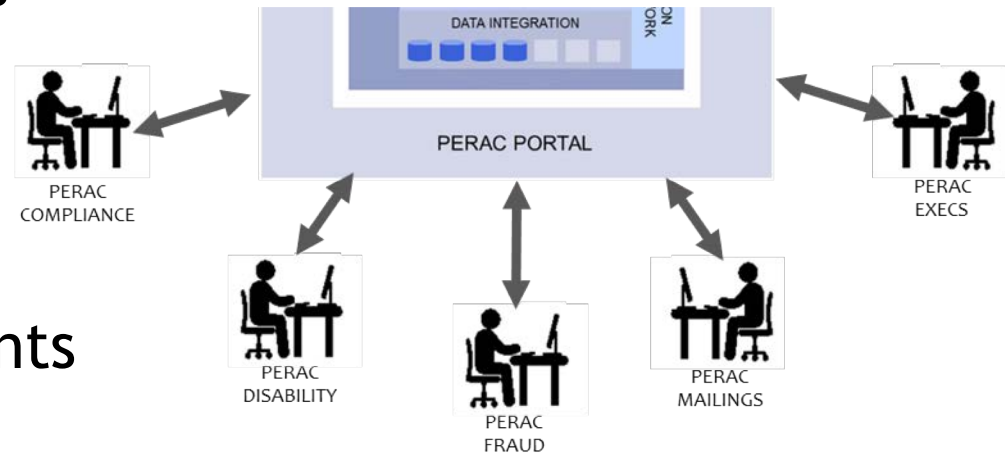
Board Portal

- Secure online location for Retirement Boards:
 - Submit forms for Compliance and Disability
 - Review status of all forms and requests
 - Receive reminders for due items
 - Access PERAC Memos



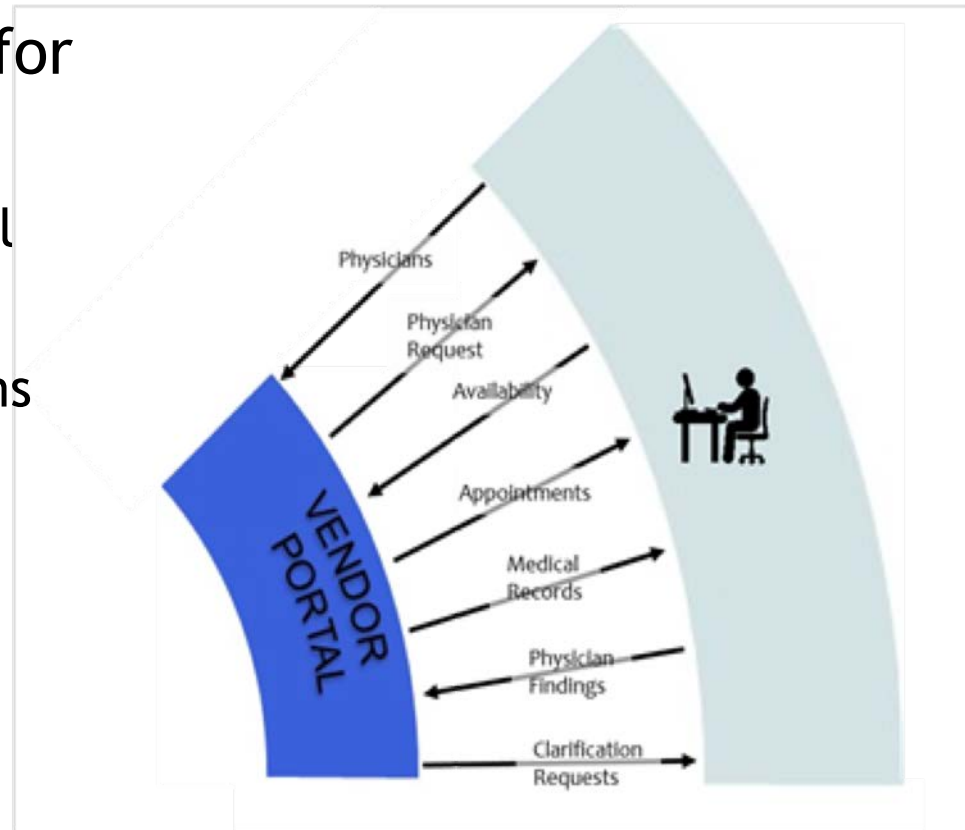
PERAC Portal

- Secure online location for PERAC:
 - Review all Compliance and Disability forms
 - Respond to forms and requests
 - Schedule Disability medical appointments
 - Receive cash books and fund information



Medical Vendor Portal

- Secure online location for Medical Vendors:
 - Submit forms for Medical Panel and CME
 - Review status of all forms
 - Access appointment documents



PERAC Helpdesk

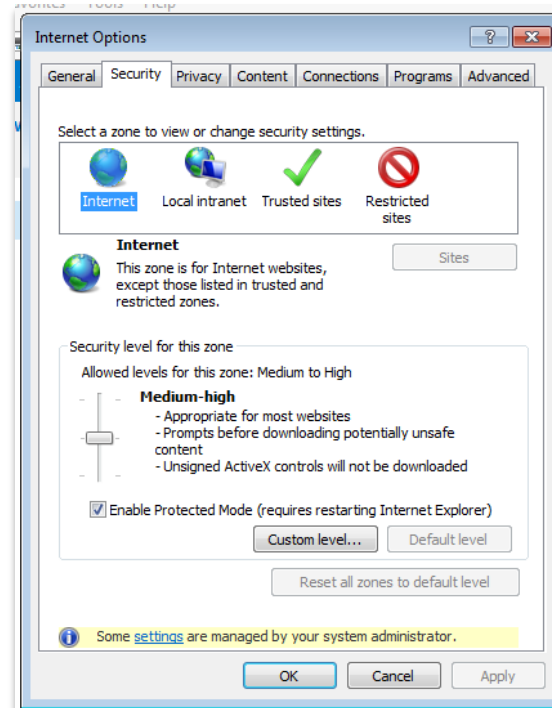
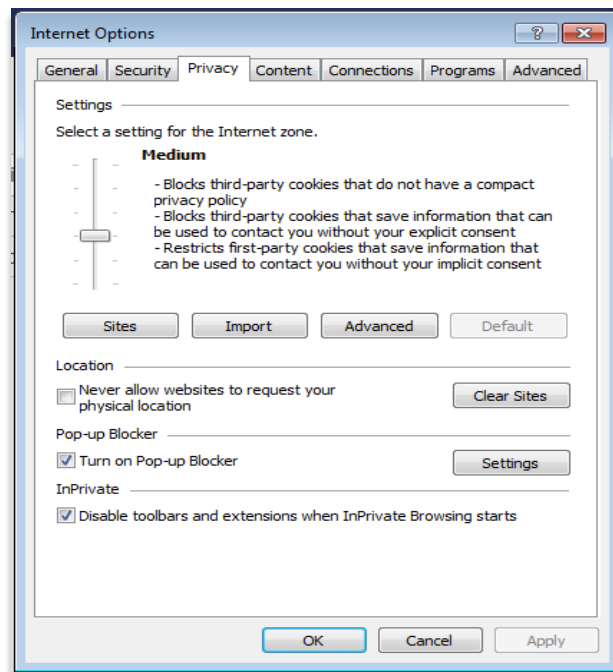
- 617-591-8983
- 617-666-4446 ext.983

Browser and Security

- Browsers supported
 - Internet Explorer - versions 10 and 11
 - Chrome
 - Firefox - most recent version
 - Edge
 - Browsers not supported
 - Safari
 - Any other browsers or versions not listed
- Browser Settings
 - Accept cookies
 - Security Settings
 - Medium

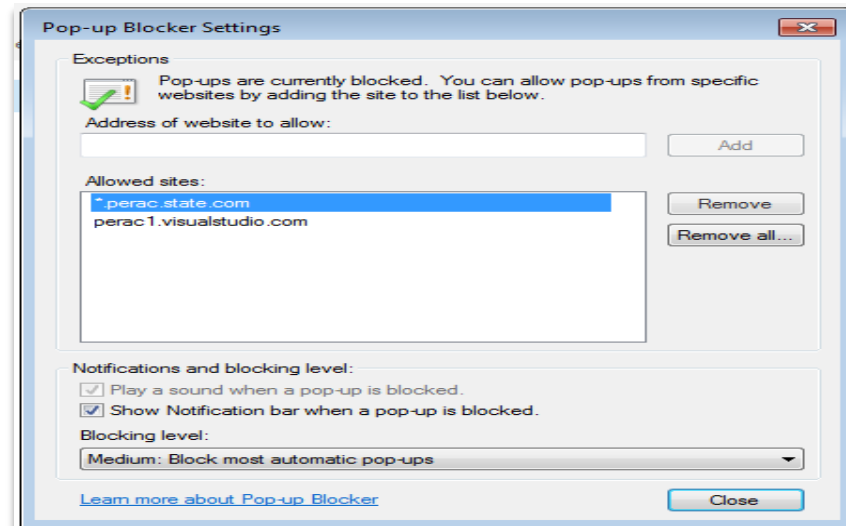
Internet Explorer

- Security and Privacy Settings-Medium
 - Go To-Tools, Internet Options, Security tab and Privacy tab



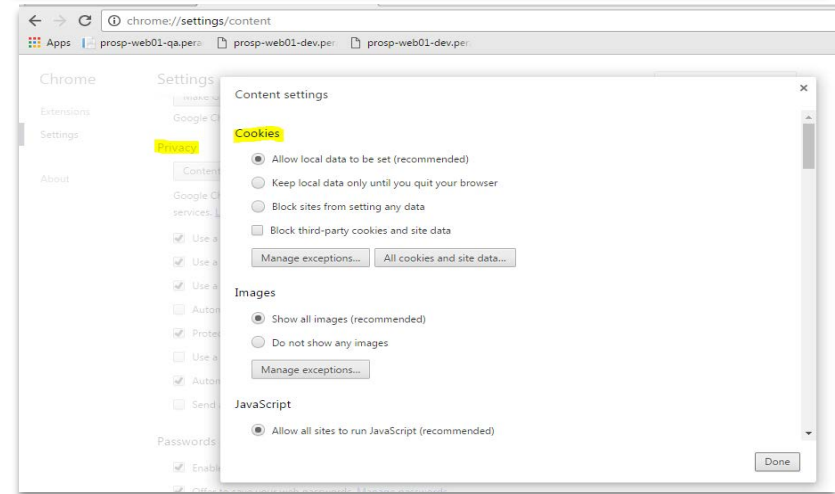
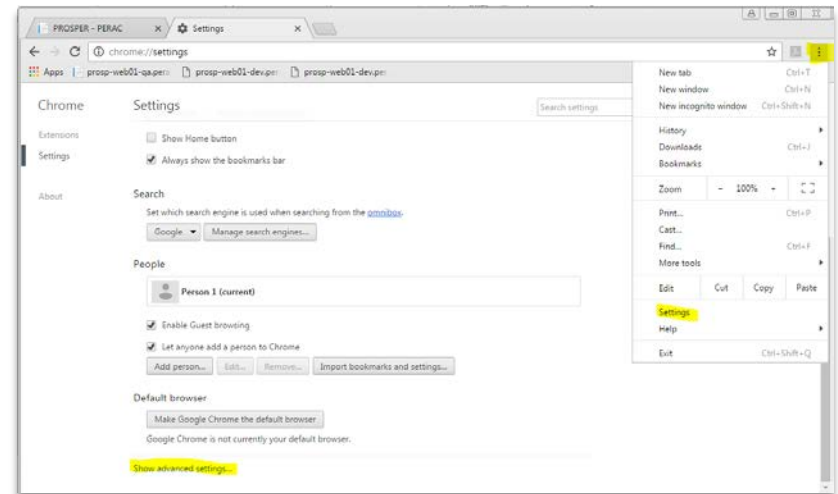
Internet Explorer (Continued)

- Pop-up Blocker Settings - Allow
 - The first time the PROSPER application is run, a message at the bottom of your screen will ask you if pop-up's should be allowed.
 - Select always Allow
 - If the above does not work, Go To-Tools, Privacy Tab(IE11), Pop-up blocker, Pop-up blocker settings and add the site to the Allowed site list.



Chrome

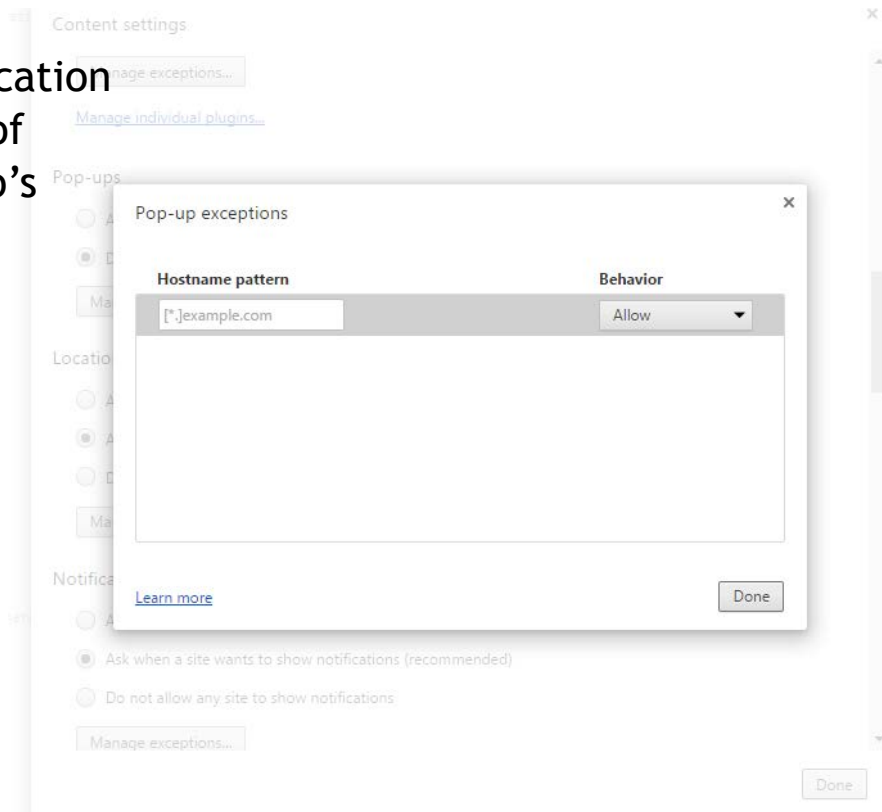
- Security and Privacy Settings
- Go To - Settings (upper right three dots)
 - Show advanced settings (bottom of page)
 - Scroll down to Privacy
 - Click on Content settings
 - Cookies - allow local data to be set



Chrome (Continued)

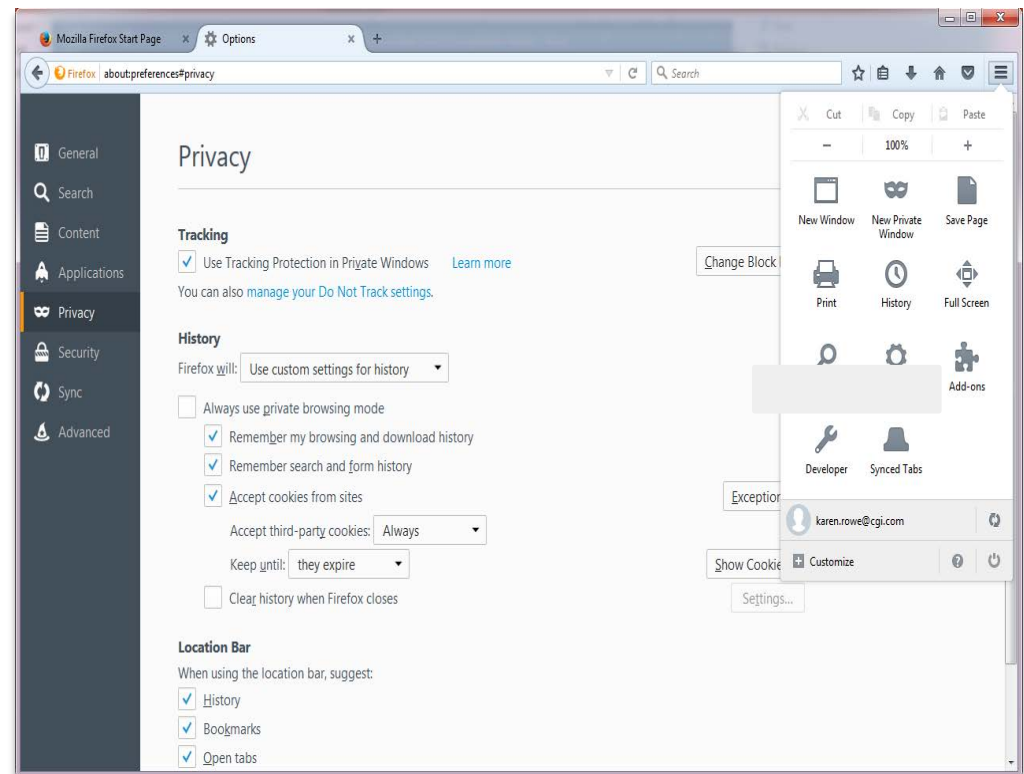
■ Pop-up Blocker Settings

- The first time the PROSPER application is run, a message at the bottom of your screen will ask you if pop-up's should be allowed.
 - Select always Allow
- If the above does not work, Go To-Tools, Pop-up blocker, Pop-up blocker settings and add the site to the Allowed site list. `[*.]perac.state.com`



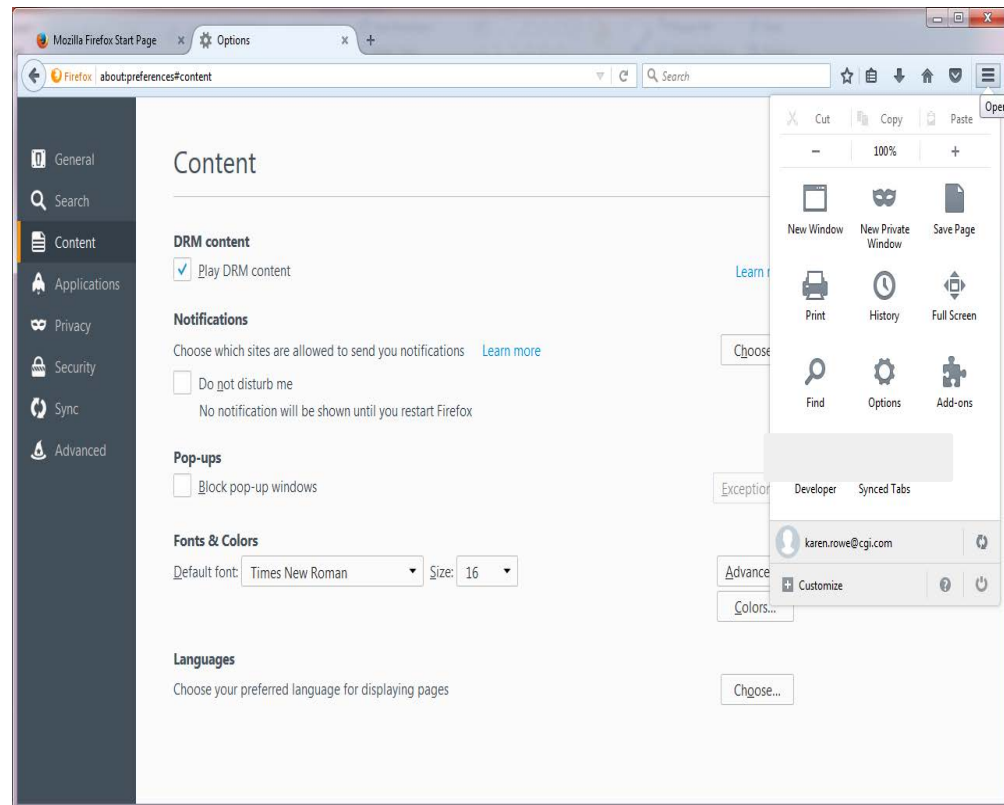
Firefox

- Privacy Settings
- Go to Options
 - Privacy
 - History
 - Firefox will: 'Use custom setting for history'.
 - Check 'Accept cookies from sites.'
 - Accept third-party cookies: 'Always'
 - Keep Until: 'they expire'



Firefox (Continued)

- Pop-up Blocker
 - The first time the PROSPER application is run, a message at the bottom of your screen will ask you if pop-up's should be allowed.
 - Select always Allow
- If above does not work
 - Go to Options
 - Content
 - Pop-ups
 - Un-check 'Block pop-up windows'.



Q & A

Registration - New User

- A new user has to have an account approved and set up in PROSPER.
 - Application form can be found <http://www.mass.gov/perac/education/edu-materials/get-to-know-prosper.html> AND <http://www.mass.gov/perac/education/edu-materials/>
- User will get an email with link to PROSPER.
 - Link is only valid for 48 hours.

Dear Karen Rowe,

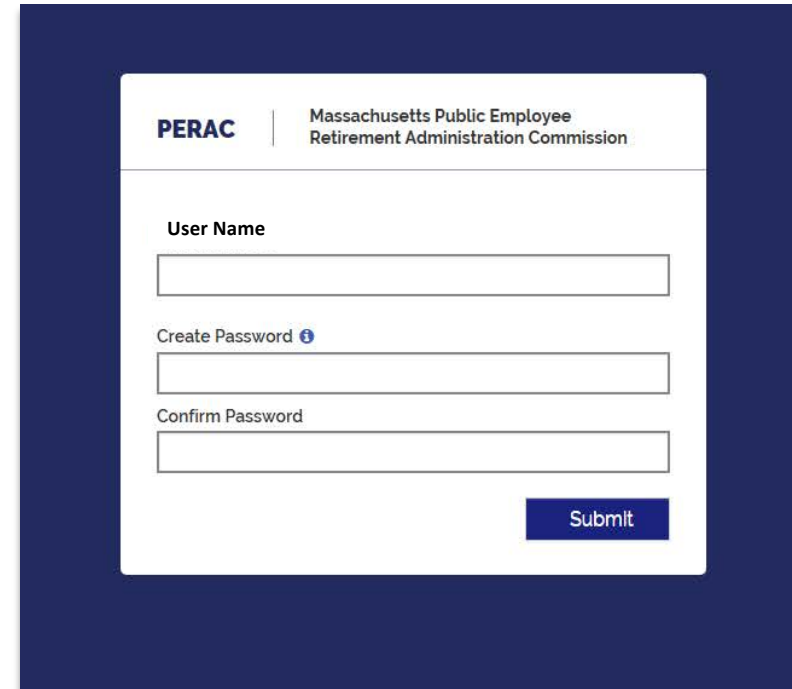
You have been invited to PERAC.

Follow this link to complete your registration.

<https://prosp-web01-qa.perac.state.com/Account/Register/a93869f4-397a-4821-89f7-b4e3e90a6c12>

Set Password

- Enter User Name (email address)
- Create password
 - Min- 8 characters
 - Includes at least 3 of the following categories:
 - Uppercase A-Z
 - Lowercase a-z
 - Numbers 0-9
 - Special Characters !@#\$%^&* _ +
 - Cannot contain spaces, part of your first, last or account name
- Re-enter password
- Click submit
- You will be prompted to update your password every 60 days.



The screenshot shows a web form for setting a password. At the top, it says 'PERAC' and 'Massachusetts Public Employee Retirement Administration Commission'. The form has three input fields: 'User Name', 'Create Password' (with a help icon), and 'Confirm Password'. A blue 'Submit' button is at the bottom right.

How To Create Strong Password

- Bruce Schneier's method
- Security expert Bruce Schneier put forth a password method back in 2008 that he still recommends today. It works like this: Take a sentence and turn it into a password.
- The sentence can be anything personal and memorable for you. Take the words from the sentence, then abbreviate and combine them in unique ways to form a password. Here are four sample sentences that I put together.
- WOO!TPwontSB = Woohoo! The Patriots won the Super Bowl!
- PPupmoarT@O@tgs = Please pick up more Toasty O's at the grocery store.
- 1tubuupshhh...imj = I tuck button-up shirts into my jeans.
- W?ow?imp::ohth3r = Where oh where is my pear? Oh, there.

Security Questions

- Select questions from dropdown list
 - First and Second question must be different
- Answers must have a minimum of two (2) characters
 - First and Second answers must be different

PROSPER | Massachusetts Public Employee Retirement Administration Commission

In the event you forget your password, you can get access using your security questions.

First Question*

First Answer*

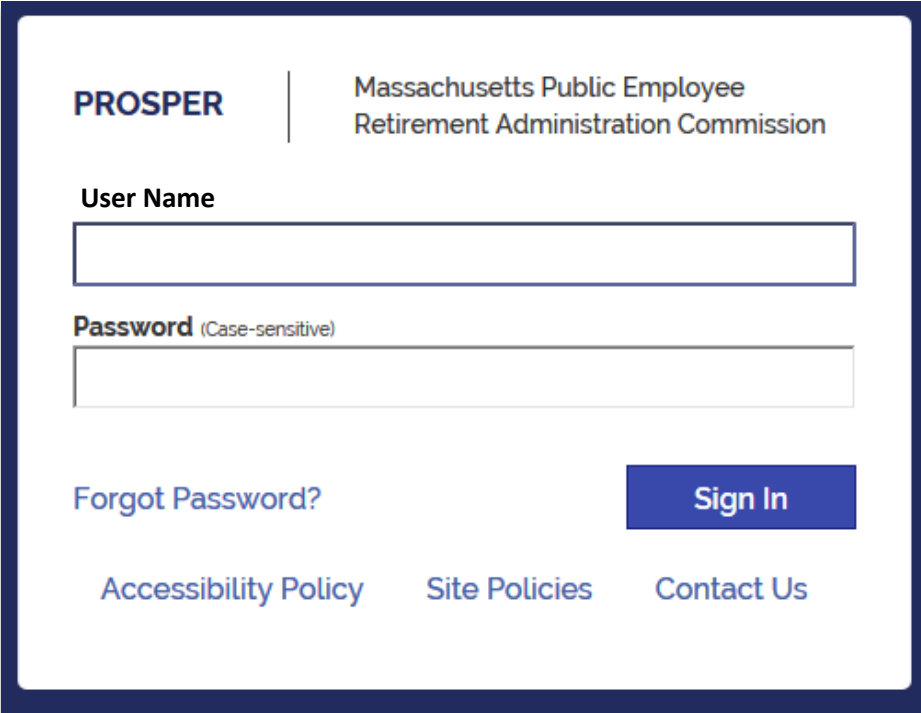
Second Question*

Second Answer*

Submit

Future Log In

- URL: Prosper.perac.state.ma.us
can be found on the PERAC Home Page
- Enter User Name
and Password
- Select Sign In button

A screenshot of the PROSPER login page. The page has a white background with a dark blue header bar at the top. The header bar contains the text "PROSPER" in white, followed by a vertical line and the text "Massachusetts Public Employee Retirement Administration Commission" in white. Below the header bar, there are two input fields: "User Name" and "Password (Case-sensitive)". Below the "Password" field, there is a link "Forgot Password?". To the right of the "Forgot Password?" link is a blue button with the text "Sign In" in white. At the bottom of the page, there are three links: "Accessibility Policy", "Site Policies", and "Contact Us".

PROSPER | Massachusetts Public Employee
Retirement Administration Commission

User Name

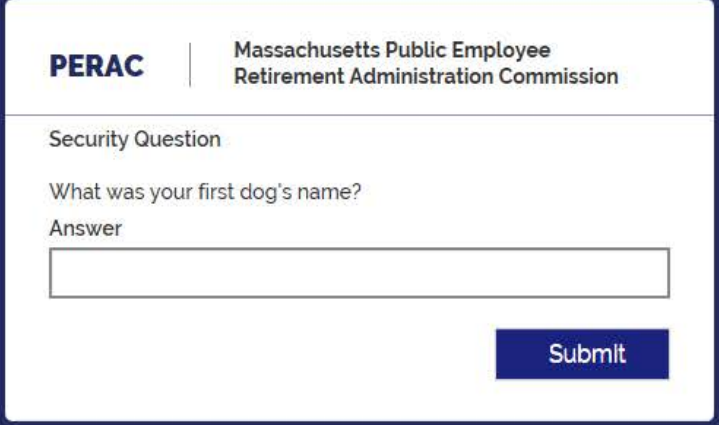
Password (Case-sensitive)

[Forgot Password?](#) [Sign In](#)

[Accessibility Policy](#) [Site Policies](#) [Contact Us](#)

Answer Security Questions

- Enter answer to the security question shown
 - Accessing from a new machine will prompt a security question
 - More than one user on a machine will prompt a security question



The screenshot shows a web form for the PERAC (Massachusetts Public Employee Retirement Administration Commission). The form is titled "Security Question" and asks "What was your first dog's name?". Below the question is a text input field labeled "Answer" and a blue "Submit" button.

PERAC | Massachusetts Public Employee Retirement Administration Commission

Security Question

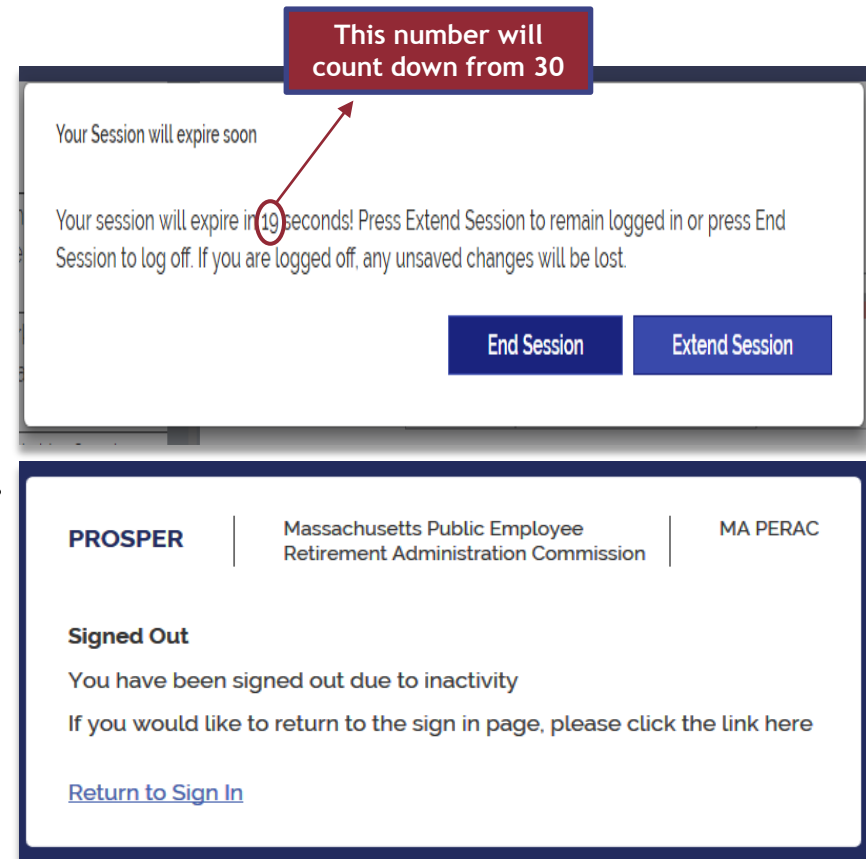
What was your first dog's name?

Answer

Submit

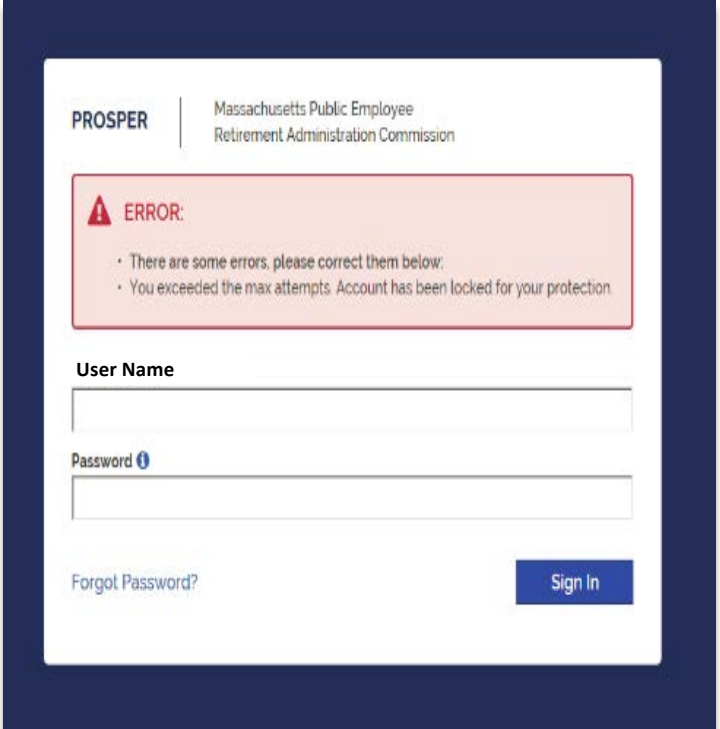
Session Time Out

- After 20 min of no activity the application will display a time out message.
- Select 'Extend' to continue use.
- Select 'End' to close the session.
- If neither is selected after 30 seconds, you will be logged out and a message will display



Locked Out For Failed Attempts

- 5 failed attempts before lock out.
- Contact PERAC IT to unlock
- 617-591-8983



The screenshot shows the PROSPER login interface for the Massachusetts Public Employee Retirement Administration Commission. At the top left is the PROSPER logo, and at the top right is the text "Massachusetts Public Employee Retirement Administration Commission". A red error box in the center contains a warning icon and the text "ERROR:" followed by two bullet points: "• There are some errors, please correct them below." and "• You exceeded the max attempts. Account has been locked for your protection." Below the error box are two input fields: "User Name" and "Password" (with an eye icon for toggling visibility). At the bottom left is a link for "Forgot Password?" and at the bottom right is a blue "Sign In" button.

Forgot Password

PERAC | Massachusetts Public Employee Retirement Administration Commission

User Name

Password ⓘ

Forgot Password?

Sign In

From: <perac-mailing@per.state.ma.us>
Date: Tue, Feb 7, 2017 at 3:58 PM
Subject: User Reset : [JosephFoley@Lexingtonboard.org]
To: peracteam@gmail.com

Dear Joseph Foley,

You are receiving this email after contacting PERAC to unlock your account. You will have 48 hours before the contained link expires.

Follow this link to reset your password and security questions:

<https://prosper.perac.state.ma.us/Account/Register/TgAPAEcAXQBYAAAA4gCDAAoAUgD4AKEAJABBAGEA9gA%3d>

PROSPER | Massachusetts Public Employee Retirement Administration Commission

Forgot Password

Email*

Submit

Forgot Password *(Continued)*

PROSPER

Massachusetts Public Employee
Retirement Administration Commission

Reset Password

Security Question

What was your first dog's name?

Answer

Create Password ⓘ

Confirm Password

Create

PROSPER

Massachusetts Public Employee
Retirement Administration Commission

User Name

Password ⓘ

[Forgot Password?](#)

[Sign In](#)

[Accessibility Policy](#)

[Site Policies](#)

[Contact Us](#)

Sign Out

BERKSHIRE COUNTY RETIREMENT BOARD Massachusetts Public Employee Retirement Administration Commission Hello, Board Admin1 **Sign Out**

Home

Compliance

Finance

Tasks

Board Evaluation has been assigned to you.

Placement Agent Statement has been assigned to you.

Vendor Disclosure has been assigned to you.

Vendor Certification has been assigned to you.

Back

Home - Berkshire County Retirement Board

PERAC Memos

Memo #9/2016
2016
Buyback And Mal

Memo #5/2016

PROSPER

Massachusetts Public Employee Retirement Administration Commission

Signed Out

You have successfully signed out of the application.

For security it is recommended that you close this tab and the browser window.

If you would like to return to the sign in page, please click the link here

[Return to Sign In](#)

When a Person Is Involved In More Than One Board

- Member of multiple boards. Log in, then choose from a list of boards.

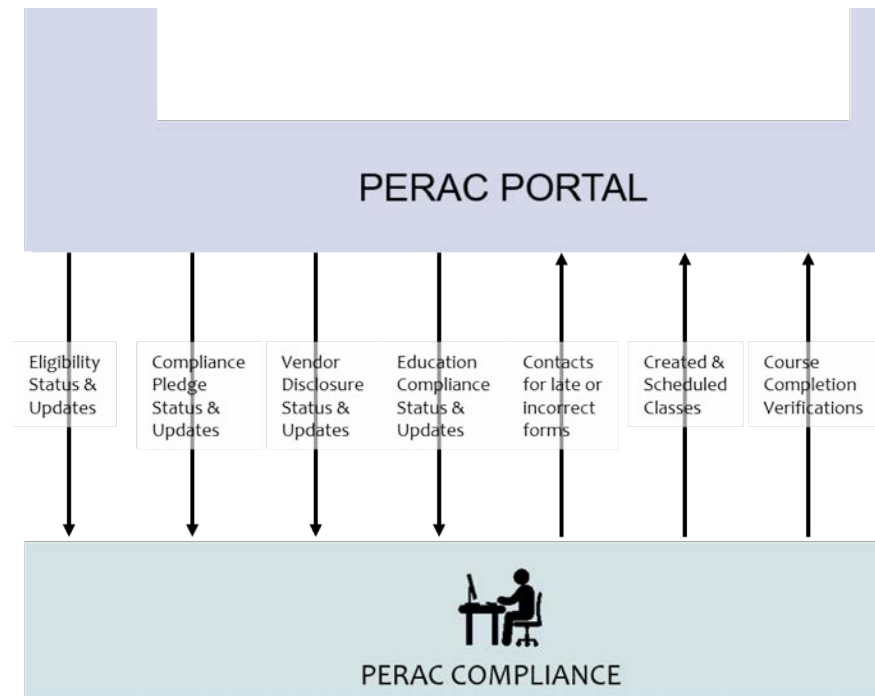


The screenshot shows the PROSPER login interface. At the top left is the PROSPER logo, and to its right is the text "Massachusetts Public Employee Retirement Administration Commission". Below this is the heading "Choose A Board". Underneath the heading is a dropdown menu. The dropdown menu is currently open, showing a list of three options: "Berkshire County Retirement Board", "Dukes County Contributory Retirement Board", and "Franklin Regional Retirement Board". The first option, "Berkshire County Retirement Board", is highlighted with a blue background.

Q & A

Compliance

- Home Page
 - Tasks
 - Notifications
- Compliance
 - Board Members
 - Vendors
 - Vendor Procurement
 - Education



Board Home Page

Hello, Board Admin1 Sign Out

Change Password

Change Security Questions

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board Admin1

Sign Out



Home

Tasks

Placement Agent Statement has been assigned to you.

Vendor Disclosure has been assigned to you.

Vendor Certification has been assigned to you.

Consultant Certification has been assigned to you.

Vendor Certification has been assigned to you.

Notifications

Board Admin1 has placed the procurement package under review.

Board Member Certification has been assigned to Test 13970.

Board Member Certification has been assigned to Board Chair1.

Board Member Certification has been assigned to Board Chair1.

Back

Home - Berkshire County Retirement Board

PERAC Memos



All Years

Memo #1/2017
2017
Updated Public Re...

Memo #12/2017
2017
2017 Interest Rate...

Memo #9/2017
2017
Buyback And Make...

Memo #10/2017
2017
Domestic Relation...

Memo #8/2017
2017
Continuing Membe...

Memo #7/2017
2017
Actuarial Data

Memo #6/2017
2017
Mandatory Retirem...

Memo #5/2017
2017
Cola Notice

Memo #4/2017
2017
2017 Limits Under...

Memo #3/2017
2017
2017 Limits Under...

Memo #2/2017
2017
The Binding Effect...

Memo #11/2017
2017
2017 Annuity Savin...

Memo #30/2016
2016
840 Cmr 10:10(3) &...

Memo #29/2016
2016
The Buyback Of Ca...

Memo #28/2016
2016
2016 Disability Data

Memo #27/2016
2016
Tobacco Company...

Memo #26/2016
2016
Appropriation Data...

Memo #20/2016
2016
Reinstatement To...

Memo #25/2016
2016
Other Post-employ...

Memo #24/2016
2016
Mandatory Retirem...

Memo #23/2016
2016
Tobacco Company...

Memo #22/2016
2016
Forfeiture Of Retir...

Memo #21/2016
2016
Updating Perac's...

Memo #19/2016
2016
Cost Of Living Incr...

Board Home Page Memos

BERKSHIRE COUNTY RETIREMENT BOARD
Massachusetts Public Employee Retirement Administration Commission
Hello, Board Admin1
Sign Out

Home
 Compliance

Tasks

Placement Agent Statement has been assigned to you.

Vendor Disclosure has been assigned to you.

Vendor Certification has been assigned to you.

Consultant Certification has been assigned to you.

Vendor Certification has been assigned to you.

Notifications

Board Admin1 has placed the procurement package under review.

Board Member Certification has been assigned to Test 13970.

Board Member Certification has been assigned to Board Chair1.

Board Member Certification has been assigned to Board Chair1.

Home - Berkshire County Retirement Board

PERAC Memos

All Years

| | | | | | |
|--|--|---|---|--|---|
| Memo #1/2017 2017 Updated Public Re... | Memo #12/2017 2017 2017 Interest Rate... | Memo #9/2017 2017 Buyback And Make... | Memo #10/2017 2017 Domestic Relation... | Memo #8/2017 2017 Continuing Membe... | Memo #7/2017 2017 Actuarial Data |
| Memo #6/2017 2017 Mandatory Retirem... | Memo #5/2017 2017 Cola Notice | Memo #4/2017 2017 2017 Limits Under... | Memo #3/2017 2017 2017 Limits Under... | Memo #2/2017 2017 The Binding Effect... | Memo #11/2017 2017 2017 Annuity Savin... |
| Memo #30/2016 2016 840 Cmr 10:10(3) &... | Memo #29/2016 2016 The Buyback Of Ca... | Memo #28/2016 2016 2016 Disability Data | Memo #27/2016 2016 Tobacco Company... | Memo #26/2016 2016 Appropriation Data... | Memo #20/2016 2016 Reinstatement To... |
| Memo #25/2016 2016 Other Post-employ... | Memo #24/2016 2016 Mandatory Retirem... | Memo #23/2016 2016 Tobacco Company... | Memo #22/2016 2016 Forfeiture Of Retir... | Memo #21/2016 2016 Updating Perac's... | Memo #19/2016 2016 Cost Of Living Incr... |

Board Home Page Tabs

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board Admin1 Sign Out

Home

Compliance

Tasks

Placement Agent Statement has been assigned to you.

Vendor Disclosure has been assigned to you.

Vendor Certification has been assigned to you.

Consultant Certification has been assigned to you.

Vendor Certification has been assigned to you.

Notifications

Board Admin1 has placed the procurement package under review.

Board Member Certification has been assigned to Test 13970.

Board Member Certification has been assigned to Board Chair1.

Board Member Certification has been assigned to Board Chair1.

Back

Home - Berkshire County Retirement Board

PERAC Memos

All Years▼

Memo #1/2017

2017 Updated Public Re...

Memo #12/2017

2017 Interest Rate...

Memo #9/2017

2017 Buyback And Make...

Memo #10/2017

2017 Domestic Relation...

Memo #8/2017

2017 Continuing Membe...

Memo #7/2017

2017 Actuarial Data

Memo #6/2017

2017 Mandatory Retirem...

Memo #5/2017

2017 Cola Notice

Memo #4/2017

2017 Limits Under...

Memo #3/2017

2017 Limits Under...

Memo #2/2017

2017 The Binding Effect...

Memo #11/2017

2017 2017 Annuity Savin...

Memo #30/2016

2016 840 Cmr 10:10(3) &...

Memo #29/2016

2016 The Buyback Of Ca...

Memo #28/2016

2016 2016 Disability Data

Memo #27/2016

2016 Tobacco Company...

Memo #26/2016

2016 Appropriation Data...

Memo #20/2016

2016 Reinstatement To...

Memo #25/2016

2016 Other Post-employ...

Memo #24/2016

2016 Mandatory Retirem...

Memo #23/2016

2016 Tobacco Company...

Memo #22/2016

2016 Forfeiture Of Retir...

Memo #21/2016

2016 Updating Perac's...

Memo #19/2016

2016 Cost Of Living Incr...

Board Home Page Tasks

BERKSHIRE COUNTY RETIREMENT BOARD Massachusetts Public Employee Retirement Administration Commission Hello Board Admin1 Sign Out

Tasks

- Board Evaluation has been assigned to you.
- Placement Agent Statement has been assigned to you.
- Vendor Disclosure has been assigned to you.

Notifications

- Board Member Certification has been assigned to Board Chair1.
- Board Member Certification has been assigned to Berkshire B User3, Jr.
- Board Member Certification has been assigned to Berkshire User2, Sr.
- Board Member Certification has been assigned to Berkshire A User1.
- Board Member Certification has been assigned to Board User1.

Home - Berkshire County Retirement Board

PERAC Memos

Search: [] All Years ▾

- Memo #01**
2013
2013 Limits Under ...
- Memo #01**
2012
Chapter 268a Com...
- Memo #01**
2011
840 CmR 10:10(3) & ...
- Memo #01**
2010
2010 Limits Under ...
- Memo #01**
2009
Cola Notice

Tasks are items that need some action to be taken.
Selecting a specific task will bring you to that task.

Board Member Tasks

Home

Compliance

Tasks

Board Member Certification has been assigned to you.

Board Procurement Compliance has been assigned to you.

Board Member Certification has been assigned to you.

Notifications

Board Member Certification has been assigned to Board Chair1.

Board Procurement Compliance has been assigned to Board Chair1.

Back

Retirement Board Member Certification

Massachusetts Law ([Chapter 32, Section 23B](#)) requires **each** retirement board member to complete this form and submit it to the Commission prior to retaining any service provider for the retirement board. In the case of investment managers upon acknowledgement from PERAC that this and other filings have been received, the board may retain the service provider.

With respect to this procurement, **each** retirement board member shall certify in writing as follows:

The undersigned certifies that, to the best of his/her knowledge and belief, this proposal has been made and submitted in good faith and without collusion or fraud with any person. As used in this certification, the word "person" shall mean a natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals.

Retirement Board: Berkshire County Retirement Board

Description of Services being proposed:

Business Name of Vendor: 57 Stars, LLC

Name: Board User1

By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.

First Name*
MI
Last Name*
Suffix

The electronic signature must match the name Board User1.

☐ I acknowledge that I am electronically signing this form*

Sign Document

Tasks will contain detailed information on form and the action that needs to be taken.

Task Completion

Home

Compliance

Tasks

Board Member Certification has been assigned to you.

Board Procurement Compliance has been assigned to you.

Board Member Certification has been assigned to you.

Notifications

Board Member Certification has been assigned to Board Chair1.

Board Procurement Compliance has been assigned to Board Chair1.

Back

Retirement Board Member Certification

In conjunction with the selection of an investment vendor Massachusetts Law (Chapter 32, Section 23, (2), (c)) requires each retirement board to complete this form and submit it to the Commission. Upon acknowledgement from PERAC that this and other filings have been received, the board may retain the service provider.

On behalf of the retirement board noted below, the undersigned certifies that, to the best of his or her knowledge and belief, in making the selection of the vendor identified below, the retirement board has complied with the process set forth in Chapter 32, Section 23B.

Retirement Board:

Berkshire County Retirement Board

Description of Services being proposed:

Business Name of Vendor:

Unhappy Camping

Name:

Board Chair1

By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.

| | | | |
|--------------|----|-------------|--------|
| First Name * | MI | Last Name * | Suffix |
| Board | | Chair1 | |

The electronic signature must match the name displayed on this document above.

☒ I acknowledge that I am electronically signing this form *

COMPLETE:

This form was signed and submitted on 9/7/2016 at 10:53 AM by Board Chair1

A Complete banner will appear once the form has been successfully signed and submitted.

Tasks Updated

The screenshot displays a web application interface. On the left is a sidebar with a 'Home' icon and a 'Compliance' icon. The 'Tasks' section in the sidebar is highlighted with a red box and contains two items: 'Board Procurement Compliance has been assigned to you.' and 'Board Member Certification has been assigned to you.'. Below this is the 'Notifications' section, which contains two items: 'Board Member Certification has been assigned to Board Chair1.' and 'Board Procurement Compliance has been assigned to Board Chair1.'. The main content area is titled 'Home - Berkshire County Retirement Board'. It features a search bar and a dropdown menu labeled 'All Years'. Below this is a section titled 'PERAC Memos' which contains five cards, each representing a memo. The first card is 'Memo #01 2013 2013 Limits Under ...'. The second card is 'Memo #01 2012 Chapter 268a Com...'. The third card is 'Memo #01 2011 840 Cmr 10:10(3) & ...'. The fourth card is 'Memo #01 2010 2010 Limits Under ...'. The fifth card is 'Memo #01 2009 Cola Notice'.

Home - Berkshire County Retirement Board

PERAC Memos

Search: [] Q All Years ▾

| Memo #01 | Memo #01 | Memo #01 | Memo #01 | Memo #01 |
|-----------------------|---------------------|------------------------|-----------------------|-------------|
| 2013 | 2012 | 2011 | 2010 | 2009 |
| 2013 Limits Under ... | Chapter 268a Com... | 840 Cmr 10:10(3) & ... | 2010 Limits Under ... | Cola Notice |

Task disappear from the list once completed.
This list changes from 3 to 2 remaining tasks.

Notifications

BERKSHIRE COUNTY RETIREMENT BOARDMassachusetts Public Employee Retirement Administration CommissionHello Board Chair1Sign Out

Home

Tasks

Compliance

Board Procurement Compliance has been assigned to you.

Board Member Certification has been assigned to you.

Notifications

Board Member Certification has been assigned to Board Chair1.

Board Procurement Compliance has been assigned to Board Chair1.

Home - Berkshire County Retirement Board

PERAC Memos

All Years ▾

Memo #01
2013
2013 Limits Under ...

Memo #01
2012
Chapter 268a Com...

Memo #01
2011
840 Cmr 10:10(3) & ...

Memo #01
2010
2010 Limits Under ...

Memo #01
2009
Cola Notice

Notifications are items that are primarily informational. Notifications show for 30 days only. Selecting a notification will display the full notification.

Notifications *(Continued)*

BERKSHIRE COUNTY RETIREMENT BOARD Massachusetts Public Employee Retirement Administration Commission Hello, Board Chair1 Sign Out

Home

Compliance

Tasks

Board Member Certification has been assigned to you.

Prohibited Investment has been assigned to you.

Board Procurement Compliance has been assigned to you.

Your Term Pledge Signature due by 11/18/2016.

Your Term Pledge Signature due by 11/17/2016.

Notifications

Board Member Certification has been assigned to Board Chair1.

Prohibited Investment has been assigned to Board Chair1.

Board Procurement Compliance has been assigned to Board Chair1.

268A Term Pledge for Board Chair1 is due by 11/18/2016.

268A Term Pledge for Board Chair1 is due by 11/17/2016.

[https://prosp-web01-qa.perac.state.com/Account/SignOut](#)

[Back](#)

Dear Board Chair1, the Vendor Procurement Money Manager has started on 10/19/2016 by Board Admin1. Board Member Certification has been assigned to you.

Follow this link to complete this task: <https://prosp-web01-qa.perac.state.com/BoardPortal/Form/9588>

Selecting a notification will display the full notification.

Q & A

Compliance Tab

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board Chair1

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Board Member Status

| Board Member | Eligibility Certification | 268A Term Pledge | Education Credits |
|--------------|---------------------------|-------------------|-----------------------------|
| Board Chair1 | Due by 11/10/2016 | Due by 11/10/2016 | 3 Credits Due by 03/16/2017 |

Vendor Status

| Vendor | Vendor Type | Fund | Status |
|-------------------|--|--------------------------------|--|
| AAL1 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Provider In P.. |
| AAL2 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Provider In P.. |
| COnsultant | Consultant | N/A | Consultant In Procurement |
| COnsultant Kim 2 | Consultant | N/A | Consultant In Procurement |
| Consultant Vendor | Consultant | Aberdeen Asset Management Inc. | |

Vendor Procurement

BERKSHIRE COUNTY RETIREMENT BOARD Massachusetts Public Employee Retirement Administration Commission Hello, Board User1 Sign Out

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Board Member Status

| Board Member | Eligibility Certification | 268A Term Pledge | Education Credits |
|--------------|---------------------------|-------------------|-------------------------|
| Board User1 | Due by 11/10/2016 | Due by 11/10/2016 | Yearly Credits Complete |

Vendor Status

| Vendor | Vendor Type | Fund | Status |
|-------------|--|------|--|
| AAL1 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Pr... |
| AAL2 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Pr... |
| CConsultant | Consultant | N/A | Consultant In Procurement |

Vendor Procurement *(Continued)*

BERKSHIRE COUNTY RETIREMENT BOARDMassachusetts Public Employee Retirement Administration CommissionHello, Board Chair1Sign Out

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Disability

Board Member Certification has been assigned to you.

Board Procurement Compliance has been assigned to you.

Prohibited Investment has been assigned to you.

Notifications

Board Member Certification has been assigned to Board Chair1.

Prohibited Investment has been assigned to Board Chair1.

Board Procurement Compliance has been assigned to Board Chair1.

Consultant Certification has been assigned to Board Chair1.

Board Member Certification has been assigned to Board Chair1.

Board Procurement Compliance

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Retirement Board Member Certification

Massachusetts Law (Chapter 32, Section 23B) requires **each** retirement board member to complete this form and submit it to the Commission prior to retaining any service provider for the retirement board. In the case of investment managers upon acknowledgement from PERAC that this and other filings have been received, the board may retain the service provider.

With respect to this procurement, **each** retirement board member shall certify in writing as follows:

The undersigned certifies that, to the best of his/her knowledge and belief, this proposal has been made and submitted in good faith and without collusion or fraud with any person. As used in this certification, the word "person" shall mean a natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals.

Retirement Board: Berkshire County Retirement Board
Description of Services being proposed:
Business Name of Vendor: 57 Stars, LLC
Name: Board Chair1

By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.

First Name*

MI

Last Name*

Suffix

The electronic signature must match the name Board Chair1.

☐ I acknowledge that I am electronically signing this form*

Sign Document

Vendor Procurement (Continued)

| BERKSHIRE COUNTY RETIREMENT BOARD | | Massachusetts Public Employee Retirement Administration Commission | | Hello, Board Chair1 Sign Out | | |
|---|---|---|--|------------------------------|--|--|
| <div>Home</div> <div>Compliance</div> <div>Disability</div> | Tasks | Back | | | | |
| | Board Member Certification has been assigned to you. | <div>Retirement Board Procurement Compliance Certification</div> <p>In conjunction with the selection of an investment vendor Massachusetts Law (Chapter 32, Section 23, (2), (c)) requires each retirement board to complete this form and submit it to the Commission. Upon acknowledgement from PERAC that this and other filings have been received, the board may retain the service provider.</p> <p>On behalf of the retirement board noted below, the undersigned certifies that, to the best of his or her knowledge and belief, in making the selection of the vendor identified below, the retirement board has complied with the process set forth in Chapter 32, Section 23B.</p> <p>Name of Vendor: Steph Test 1 Business Name of Vendor: Steph Test 1 Retirement Board: Berkshire County Retirement Board Name of Retirement Board Chairperson: Board Chair1</p> <p>By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.</p> <p>First Name* MI Last Name* Suffix</p> <p><input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p>The electronic signature must match the name Board Chair1</p> <p><input type="checkbox"/> I acknowledge that I am electronically signing this form*</p> <p>Sign Document</p> | | | | |
| | Prohibited Investment has been assigned to you. | | | | | |
| | Board Procurement Compliance has been assigned to you. | | | | | |
| | Your Term Pledge Signature due by 11/18/2016. | | | | | |
| | Your Term Pledge Signature due by 11/17/2016. | | | | | |
| | Notifications | | | | | |
| | Board Member Certification has been assigned to Board Chair1. | | | | | |
| | Prohibited Investment has been assigned to Board Chair1. | | | | | |
| | Board Procurement Compliance has been assigned to Board Chair1. | | | | | |
| 268A Term Pledge for Board Chair1 is due by 11/18/2016. | | | | | | |
| 268A Term Pledge for Board Chair1 is due by 11/17/2016. | | | | | | |

Vendor Status

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board Chair1

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Board Member Status

| Board Member | Eligibility Certification | 268A Term Pledge | Education Credits |
|--------------|---------------------------|-------------------|-----------------------------|
| Board Chair1 | Due by 11/10/2016 | Due by 11/10/2016 | 3 Credits Due by 03/16/2017 |

Vendor Status

| Vendor | Vendor Type | Fund | Status |
|-------------------|--|--------------------------------|--|
| AAL1 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Provider In P.. |
| AAL2 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Provider In P.. |
| COnsultant | Consultant | N/A | Consultant In Procurement |
| COnsultant Kim 2 | Consultant | N/A | Consultant In Procurement |
| Consultant Vendor | Consultant | Aberdeen Asset Management Inc. | |

Vendor Procurement

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello Board User1 Sign Out

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Vendor Procurement Package

+ 1. Business Information

- 2. Contact Information

First Name

Consulting

MI

Last Name

Guy

Suffix

Title

Lead Consultant

Address

100 Summer St

City

Boston

State

MA

Country

USA

Zip

02110

Email

cguy@xyz.com

Phone Type

Cell

Phone

(617) 334-9998

Fax

| Forms | Assigned | Complete | Attachments |
|---|------------------------|----------|-------------|
| Retirement Board Procurement Compliance Certification | Board Chair1 | - | |
| Vendor Certification | Board Compliance Admin | - | |
| Vendor Disclosure | Board Compliance Admin | - | |

Vendor Procurement *(Continued)*

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Vendor Procurement Package

| Forms | Assigned | Complete | Attachments |
|---|--------------------|----------|-------------|
| Vendor Certification | Compliance Admin | - | |
| Retirement Board Evaluation | Compliance Admin | - | |
| Vendor Contact Info | Compliance Admin | ✓ | |
| Retirement Board Procurement Compliance Certification | Chuck Zttestzchair | - | |
| Other Documents | Compliance Admin | | |
| Retirement Board Member Certification | | - | |
| | Chuck Zttest3 | - | |

Back

Vendor Procurement Package

| | | |
|---|--------------------|---|
| Retirement Board Certification of Consultant Reports | Compliance Admin | - |
| Vendor Certification | Compliance Admin | - |
| Vendor Contact Info | Compliance Admin | ✓ |
| Retirement Board Procurement Compliance Certification | Chuck Zttestzchair | - |
| Other Documents | Compliance Admin | |
| Retirement Board Member Certification | | - |
| | Chuck Zttest3 | - |
| | Chuck Zttest4 | - |
| | Chuck Zttest5 | - |
| | Chuck Zttest1 | - |
| | Chuck Zttestzchair | - |

Delete Submit

Vendor Procurement *(Continued)*

BERKSHIRE COUNTY RETIREMENT BOARD Massachusetts Public Employee Retirement Administration Commission

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Vendor Procurement Package

- 1. Business Information
- 2. Contact Information

Forms

- Retirement Board Procurement Compliance Certification
- Vendor Certification
- Vendor Disclosure
- Vendor Contact Info
- Placement Agent Statement
- Retirement Board Evaluation
- Retirement Board Member Certification

New Vendor Disclosures Form

Name of Company/Entity: laskd
 Retirement Board: Berkshire County Retirement Board
 CUSIP: N/A
 Fund Name: N/A

Compensation PAID ☒ Yes ☐ No

Compensation RECEIVED ☐ Yes ☒ No

Conflict of Interest ☐ Yes ☒ No

Save Submit

Compensation PAID ☒ Yes ☐ No

| Recipient of Compensation | Form of Compensation | Value of Compensation |
|---------------------------|----------------------|-----------------------|
| | | |
| | | |
| | | |
| | | |
| | | |

Compensation RECEIVED

Conflict of Interest

Compensation RECEIVED ☒ Yes ☐ No

| Source of Compensation | Form of Compensation | Value of Compensation |
|------------------------|----------------------|-----------------------|
| | | 0 |
| | | 0 |
| | | 0 |
| | | 0 |
| | | 0 |

Add Attachment

Conflict of Interest ☒ Yes ☐ No

Please describe on conflict of interest

Add Attachment

Board User1
 Berkshire User1
 Berkshire User2, Sr
 Berkshire User3, Jr
 Board Chair1

Under Review

Back

Vendor Procurement Package

ALERT:

- Cheryl L. Johnson on 2/15/2019 at 7:07 AM
Dear Chuck Zztestadm,
Your Vendor Procurement Package for Zztest PERAC Vendor money managers has been put Under Review. The following questions were asked:
Please delete as discussed.
- Chuck S Hoyt on 2/14/2019 at 12:38 PM

+ 1. Business Information

+ 2. Contact Information

+ Additional Information

- Notes

| Comments | Date | Updated By | Document |
|-----------|------|------------|----------|
| Not found | | | |

Add New

Other Documents

Select Add Attachment for multiple documents. See History Link for complete document list.

Add Attachment

Close

Other Documents Compliance Admin 2

More than one document can be attached

Under Review (Continued)

Back

Vendor Procurement Package

ALERT:

- Cheryl L Johnson on 2/15/2019 at 7:07 AM
Dear Chuck Zttestadm,
Your Vendor Procurement Package for Zttest PERAC Vendor money manager1 has been put Under Review. The following questions were asked.
Please delete as discussed.
- Chuck S Hoyt on 2/14/2019 at 12:38 PM

| | | |
|--|--------------------|---|
| Retirement Board Prohibited Investment Compliance Form | Chuck Zttestzchair | ✓ |
| Other Documents | Compliance Admin | 2 |
| Retirement Board Member Certification | | ✗ |
| | Chuck Zttest3 | ✓ |
| | Chuck Zttest4 | ✓ |
| | Chuck Zttest5 | ✓ |
| | Chuck Zttest1 | ✓ |
| | Chuck Zttestzchair | ✓ |

Delete

Submit

Cancel Procurement Package

Once you delete this procurement package, it will be no longer available. Are you sure you want to delete it?

No Yes

Q & A

Retirement Board Change Form

BERKSHIRE COUNTY RETIREMENT BOARD Massachusetts Public Employee Retirement Administration Commission Hello, Board Chair Sign Out

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Form Submission Start Vendor Procurement **Board Change Form**

Education Registrations Education Updates

Board Member Status

| Board Member | Eligibility Certification |
|--------------|---------------------------|
| Board Chair1 | Due by 11/10/2016 |

Vendor Status

| Vendor | Vendor Type |
|-------------------|-------------------------------|
| AAL1 | Accounting, Actuarial & Legal |
| AAL2 | Accounting, Actuarial & Legal |
| Consultant | Consultant |
| Consultant Kim 2 | Consultant |
| Consultant Vendor | Consultant |

This file includes fillable form fields.
You can print the completed form and save it to your device or Acrobat.com.

Retirement Board Change Form

GENERAL INFORMATION

Name of Retirement Board:

Your Name:

Your Telephone Number:

CONTACT INFORMATION

Aberdeen Asset Management Inc.

Board Member Status

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board Chair1

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Board Member Status

| Board Member | Eligibility Certification | 268A Term Pledge | Education Credits |
|--------------|---------------------------|-------------------|-----------------------------|
| Board Chair1 | Due by 11/10/2016 | Due by 11/10/2016 | 3 Credits Due by 03/16/2017 |

Vendor Status

| Vendor | Vendor Type | Fund | Status |
|-------------------|--|--------------------------------|--|
| AAL1 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Provider In P.. |
| AAL2 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Provider In P.. |
| COnsultant | Consultant | N/A | Consultant In Procurement |
| COnsultant Kim 2 | Consultant | N/A | Consultant In Procurement |
| Consultant Vendor | Consultant | Aberdeen Asset Management Inc. | |

Board Member Page

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1 Sign Out

Home

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Board User1 Email: board@user1.com Edit

1111 Walk Hill Ave Phone Type:Cell

Lexington MA, 02421 Phone:000-000-0000

Term/Role Info

Term: 3/16/2016 - 3/15/2019

Role: Appointed Member

Status: Active

Education Status

| Taken Credits | Required Credits |
|------------------------------|------------------|
| Term | 18 |
| Year 1 (3/16/2016-3/15/2017) | 9 |
| Year 2 (3/16/2017-3/15/2018) | 9 |
| Year 3 (3/16/2018-3/15/2019) | 6 |
| Courses | |

Statements of Financial Interest

| Year | Received Date |
|------|---------------|
| 2014 | 2/1/2017 |

Eligibility Certification

Eligibility Year:

Last Notice Date:

Response Date:

Status

Submitted Forms

| Form | Received | View |
|-----------|----------|------|
| Not found | | |

Board Member Page (Continued)

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1 Sign Out

Home

Compliance

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Board User1

Email: board@user1.com

1111 Walk Hill Ave

Lexington MA, 02421

Phone Type: Cell

Phone: 000-000-0000

Edit

Term/Role Info

Term: 3/16/2016 - 3/15/2019

Role: Appointed Member

Status: Active

Eligibility Certification

Education Status

Taken Credits

Term

Year 1 (3/16/2016-3/15/2017) 0

Year 2 (3/16/2017-3/15/2018) 0

Year 3 (3/16/2018-3/15/2019) 0

Statements of Financial Interest

Year

Received Date

2014

2/1/2017

View

Edit a Board Member's Contact Information

First Name:* Board

MI:

Last Name:* User1

Suffix:

Address:* 1111 Walk Hill Ave

City, State, Zip:* Lexington MA 02421

Email:* board@user1.com

Phone Type:* Cell

Phone:* 000-000-0000

Save

Board Member Page (Continued)

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1 Sign Out

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Board User1 Email: board@user1.com Edit

1111 Walk Hill Ave Phone Type: Cell

Lexington MA, 02421 Phone: 000-000-0000

Term/Role Info

Term: 3/16/2016 - 3/15/2019

Role: Appointed Member

Status: Active

Education Status





| Taken Credits | Required Credits |
|--------------------------------|------------------|
| Term | 18 |
| Year 1 (3/16/2016-3/15/2017) 9 | 3 |
| Year 2 (3/16/2017-3/15/2018) 0 | 3 |
| Year 3 (3/16/2018-3/15/2019) 0 | 6 |

Courses

Statements of Financial Interest


| Year | Received Date |
|------|---------------|
| 2014 | 2/1/2017 |

Current Term

| Course Name | Course Date | Course Location | Course Certificate |
|------------------|-------------|---|---|
| Internet Admin | 2/22/2017 | 100 Consultant Parkway Atlanta GA, 11111 |  |
| Internet PROSPER | 2/22/2017 | 5 Middlesex Avenue Suite 304 Somerville MA, 02145 |  |
| Internet | 2/22/2017 | 5 Middlesex Avenue Suite 304 Somerville MA, 02145 |  |
| Internet Final | 2/22/2017 | 5 Middlesex Avenue Suite 304 Somerville |  |

Past Terms

| Course Name | Course Date | Course Location | Course Certificate |
|-------------|-------------|-----------------|--------------------|
| Not found | | | |



Q & A

Education - Registration

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1 Sign Out



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Board Member Status

| Board Member | Eligibility Certification | 268A Term Pledge | Education Credits |
|--------------|---------------------------|-------------------|-------------------------|
| Board User1 | Due by 11/10/2016 | Due by 11/10/2016 | Yearly Credits Complete |

Vendor Status

| Vendor | Vendor Type | Fund | Status |
|-------------------|--|--------------------------------|--|
| AAL1 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Provider In P.. |
| AAL2 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Provider In P.. |
| COnsultant | Consultant | N/A | Consultant In Procurement |
| COnsultant Kim 2 | Consultant | N/A | Consultant In Procurement |
| Consultant Vendor | Consultant | Aberdeen Asset Management Inc. | |

Education Registration *(Continued)*

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1 Sign Out

Home

Compliance

Education Registration

Board User1 Current Credits Needed: 0

Register

Financial Controls for Retirement Systems

| Session Dates | Location | Register |
|---------------|----------------|-------------------------------------|
| 4/20/2016 | St. Louis, MA | <input checked="" type="checkbox"/> |
| 11/11/2016 | Somerville, MA | <input type="checkbox"/> |

Annual Statement: Schedule 7

| Session Dates | Location | Register |
|---------------|----------------|--------------------------|
| 11/11/2016 | Somerville, MA | <input type="checkbox"/> |

Education Registration *(Continued)*

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1

[Sign Out](#)

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Compliance

Education Registration

Board User1 **Current Credits Needed:** 0[Register](#)

✓ **COMPLETE:** Board User1 has successfully registered for Financial Controls for Retirement Systems.

Annual Statement: Schedule 7

| Session Dates | Location | Register |
|---------------|----------------|--------------------------|
| 11/11/2016 | Somerville, MA | <input type="checkbox"/> |

Education Updates

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1

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Board Member Status

| Board Member | Eligibility Certification | 268A Term Pledge | Education Credits |
|--------------|---------------------------|-------------------|-------------------------|
| Board User1 | Due by 11/10/2016 | Due by 11/10/2016 | Yearly Credits Complete |

Vendor Status

| Vendor | Vendor Type | Fund | Status |
|-------------------|--|--------------------------------|---|
| AAL1 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Provider In P... |
| AAL2 | Accounting, Actuarial & Legal Service Provider | N/A | Accounting Actuarial and Legal Service Provider In P... |
| Consultant | Consultant | N/A | Consultant In Procurement |
| Consultant Kim 2 | Consultant | N/A | Consultant In Procurement |
| Consultant Vendor | Consultant | Aberdeen Asset Management Inc. | |

Education Updates *(Continued)*

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1

[Sign Out](#)


Home


Compliance

Education Certification

Board User1 **Current Credits Needed:** 3

Select Course



Select Submission



Education Certificates

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1

[Sign Out](#)

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Compliance

Education Certification

Board User1 **Current Credits Needed:** 0**Select Course:** Financial Controls for Retirement Systems on 4/20/2016 **Select Submission:** Certificate**Board Member:** Board User1**Retirement Board:** Berkshire County Retirement Board**Course:** Financial Controls for Retirement Systems**Credits:** 3**Certificate Upload:** PROSPER.pdf [Browse...](#)[Submit](#)

Education Affidavit

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello Board Chair1

[Sign Out](#)[Home](#)[Compliance](#)

Education Certification

Board Chair1 **Current Credits Needed:** 3**Select Course** Internet Admin **Select Submission** Affidavit

Board Member: Board Chair1
Retirement Board: Berkshire County Retirement Board
Course: Internet Admin
Credits: 4

Affidavit

The undersigned certifies under the penalties of perjury that he/she has views in its entirety on 04/20/2016 the training seminar entitled, Internet Admin.

By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.

| First Name * | MI | Last Name * | Suffix |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

The electronic signature must match the name displayed on this document above.

☐ I acknowledge that I am electronically signing this form *

[Sign Document](#)

Education

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1

[Sign Out](#)

Home



Compliance

Education Certification

Board User1 **Current Credits Needed:** 0**Select Course** **Select Submission**

Board Member: Board User1
Retirement Board: Berkshire County Retirement Board
Course: Financial Controls for Retirement Systems
Credits: 3
Update Date: 10/12/2016

[View Certificate](#)

✓ **COMPLETE:** The certificate was uploaded and submitted on 10/12/2016 by 11:49 AM by Board User1

Education (Continued)

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Berkshire A User1

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Board Member Status

| Board Member | Eligibility Certification | 268A Term Pledge | Education Credits |
|-------------------|---------------------------|------------------|----------------------------|
| Berkshire A User1 | Exempt | | 3 Credits Due by 3/15/2017 |

Vendor Status

| Vendor | Vendor Type | Fund | Status |
|---------------------|-------------|------|---|
| S&G Consultants LLP | Consultant | N/A | Consultant In Procurement |

Q & A

Eligibility Certification - Notification

| BERKSHIRE COUNTY RETIREMENT BOARD | | Massachusetts Public Employee Retirement Administration Commission | | Hello, Berkshire User2 Sign Out | |
|--|--|--|--|---------------------------------|--|
| Home Compliance Disability | Tasks | Back | | | |
| | Board Member Certification has been assigned to you. | Berkshire User2 - Annual Eligibility Certification Massachusetts Law (Chapter 32, Section 20 (4 7/8), Chapter 34B, Section 19) prohibits an individual who is an "employee, contractor, vendor or person receiving remuneration, financial benefit, or consideration of any kind, other than a retirement benefit or statutory stipend for serving on the retirement board, from a retirement board or from a person doing business with a retirement board" from serving on a retirement board. Each retirement board member must complete this form and submit it to the retirement board and the Commission by February 1st of each year. In addition, new retirement board members must complete this form and submit it to the retirement board and the Commission prior to taking office. The undersigned certifies that he/she is not an employee, contractor, vendor, or person receiving remuneration, financial benefit or consideration of any kind from a retirement board or from a person doing business with a retirement board. As used in this certification, the word "person" shall mean a natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals. Retirement Board: Berkshire County Retirement Board Name: Berkshire User2, Sr. Term: From: 03/16/2016 To: 03/16/2019 Title: Elected Member By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge. First Name* <input type="text"/> MI <input type="text"/> Last Name* <input type="text"/> Suffix <input type="text"/> The electronic signature must match the name Berkshire User2, Sr. <input type="checkbox"/> I acknowledge that I am electronically signing this form* | | | |
| | Your Term Pledge Signature due by 11/06/2016. | | | | |
| | Your Eligibility Signature due by 11/06/2016. | | | | |
| | Notifications | | | | |
| | Board Member Certification has been assigned to Berkshire User2, Sr. | | | | |
| | 268A Term Pledge for Berkshire User2, Sr is due by 11/06/2016. | | | | |
| | Annual Eligibility for Berkshire User2, Sr is due by 11/06/2016. | | | | |



perac-mailing@per.state.ma.us

to me ▾

Oct 11 (7 days ago) ☆



Dear Berkshire User2, Sr,

Your Annual Eligibility certification is due on 11/10/2016.

Follow this link to complete this task: <https://prosp-web01-qa.perac.state.com/BoardPortal/Form/5205>

Member Signature

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board User1 Sign Out

Home

Tasks

Board Member Certification has been assigned to you.

Compliance

Board Member Certification has been assigned to you.

Disability

Certification for Member Disability Transmittal has been assigned to you.

Your Eligibility Signature due by 11/10/2016.

Your Eligibility Signature due by 11/10/2016.

Notifications

Board Member Certification has been assigned to Board User1.

Board Member Certification has been assigned to Board User1.

Board User1 has updated their Course Registration

Education Registration

Board Member Certification has

Back

Board User1 - Annual Eligibility Certification

Massachusetts Law (Chapter 32, Section 20 (4 7/8), Chapter 34B, Section 19) prohibits an individual who is an "employee, contractor, vendor or person receiving remuneration, financial benefit, or consideration of any kind, other than a retirement benefit or statutory stipend for serving on the retirement board, from a retirement board or from a person doing business with a retirement board" from serving on a retirement board.

Each retirement board member must complete this form and submit it to the retirement board and the Commission by February 1st of each year. In addition, new retirement board members must complete this form and submit it to the retirement board and the Commission prior to taking office.

The undersigned certifies that he/she is not an employee, contractor, vendor, or person receiving remuneration, financial benefit or consideration of any kind from a retirement board or from a person doing business with a retirement board.

As used in this certification, the word "person" shall mean a natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals.

Retirement Board: Berkshire County Retirement Board

Name: Board User1

Term: From: 03/16/2016 To: 03/16/2019

Title: Appointed Member

By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.

First Name*

MI

Last Name*

Suffix

The electronic signature must match the name Board User1.

☐ I acknowledge that I am electronically signing this form*

Sign Document

Complete

PROSPER

Massachusetts Public Employee Retirement Administration Commission

Hello, PERAC User1

Sign Out

Tasks

Boards

Vendors

Education

Admin

Refinements

All

Education

Eligibility

Term Pledge

Vendor Disclosure

Status

All

No Response

Complete

Task List

Board User1, Berkshire County Retirement Board, Annual Eligibility, .

Back

COMPLETE:

This form was acknowledged on 10/7/2016 at 10:46 AM by PERAC User1.

Board User1 - Annual Eligibility Certification

Massachusetts Law (Chapter 32, Section 20 (4 7/8), Chapter 34B, Section 19) prohibits an individual who is an "employee, contractor, vendor or person receiving remuneration, financial benefit, or consideration of any kind, other than a retirement benefit or statutory stipend for serving on the retirement board, from a retirement board or from a person doing business with a retirement board" from serving on a retirement board.

Each retirement board member must complete this form and submit it to the retirement board and the Commission by February 1st of each year. In addition, **new** retirement board members must complete this form and submit it to the retirement board and the Commission prior to taking office.

The undersigned certifies that he/she is not an employee, contractor, vendor, or person receiving remuneration, financial benefit or consideration of any kind from a retirement board or from a person doing business with a retirement board.

As used in this certification, the word "person" shall mean a natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals.

Retirement Board: Berkshire County Retirement Board
Name: Board User1
Term: From: 03/16/2016 To: 03/16/2019
Title: Appointed Member

By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.

perac-mailing@per.state.ma.us

to me

Oct 12 (6 days ago)

☆

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Berkshire User2, Sr,

Your Annual Eligibility certification was acknowledged on 10/12/2016.

Term Pledge Notification

BERKSHIRE COUNTY RETIREMENT BOARD

Massachusetts Public Employee Retirement Administration Commission

Hello, Board Chair1 Sign Out

Home

Compliance

Disability

Tasks

Board Member Certification has been assigned to you.

Prohibited Investment has been assigned to you.

Your Term Pledge Signature due by 11/18/2016.

Your Term Pledge Signature due by 11/17/2016.

Certification for Member Disability Transmittal has been assigned to you.

Notifications

Board Member Certification has been assigned to Board Chair1.

Prohibited Investment has been assigned to Board Chair1.

Board Procurement Compliance

Back

Board Chair1 - Chapter 268A Compliance Pledge

Massachusetts Law (Chapter 32, Section 23 (3)) Requires **each** retirement board member upon the commencement of his/her term to file with the Commission "...a statement acknowledging the member is aware of and will comply with the standards set forth in Chapter 268A, this chapter (Chapter 32) and rules and regulations promulgated under this chapter."

Each retirement board member must complete this form and submit it to the retirement board and the Commission prior to assuming his/her position as a retirement board member and prior to commencing a new term on the retirement board if the individual has served on the retirement board.

The undersigned certifies that he/she is aware of and will comply with the standards set forth in Chapter 268A, Chapter 32 and rules and regulations promulgated under Chapter 32.

Retirement Board: Berkshire County Retirement Board
Name: Board Chair1
Term: From: 03/16/2016 To: 03/16/2019
Title: Chairperson

By entering my name, checking the Electronic Signature box, and clicking on the buttons, I certify under the penalty of perjury that the information provided herein is true and complete to the best of my knowledge.

perac-mailing@per.state.ma.us

to me

Oct 13 (5 days ago)

☆

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Renee Member 4,


Your 268A Term Pledge Is Due on 11/12/2016.


Follow this link to complete this task: <https://prosp-web01-qa.perac.state.com/BoardPortal/Form/6406>

Term Pledge Acknowledge

BERKSHIRE COUNTY RETIREMENT BOARDMassachusetts Public Employee Retirement Administration CommissionHello, Board Chair1Sign Out

**Home**

**Compliance**

**Disability**

Tasks

Board Member Certification has been assigned to you.

Prohibited Investment has been assigned to you.

Your Term Pledge Signature due by 11/17/2016.

Certification for Member Disability Transmittal has been assigned to you.

Certification for Member Disability Transmittal has been assigned to you.

Notifications





2016 268A Term Pledge Board Chair1 was acknowledged on 10/21/2016.


Board Member Certification has been assigned to Board Chair1.

Prohibited Investment has been assigned to Board Chair1.

[Back](#)

Dear Board Chair1, your 268A Term Pledge Has Been Acknowledged on 10/21/2016.

**perac-mailing@per.state.ma.us**Oct 12 (6 days ago)

to me 

Dear Berkshire User2, Sr, your 268A Term Pledge Has Been Acknowledged on 10/12/2016.

Compliance - SFI

- No changes to the current process
- Once PERAC receives and reviews SFI you will receive a notification.
 - SFI information is not recorded in PROSPER, just that the form was received and reviewed.



perac-mailing@per.state.ma.us

to me ▾

Sep 27 ☆



Dear Board User1, the SFI for year 2016 has been marked as complete.