

QBS: Fiduciary Services - Rankings of Top 3 Firms

Firm Name	EVALUATION CRITERIA (5 REVIEWERS)					Total Points	Rank
	Review of the current investment structure, investment options	Identification of the appropriate share class to	Assistance with record-keeper review,	Registration status of firm and advisors	Cybersecurity coverage		
	(30 pts max per reviewer)	(15 pts max per reviewer)	(25 pts max per reviewer)	(10 pts max per reviewer)	(20 pts max per reviewer)		
	(120 pts max total)	(60 pts max total)	(100 pts max total)	(40 pts max total)	(80 pts max total)		
Creative Planning Retirement Services	108	54	98	25	43	328	1
LPL Financial Retirement Partners	102	49	87	40	44	322	2
Retirement Plan Advisors, LLC	93	47	75	40	40	295	3

Bid Number: 23-73

Date Posted: 10/30/2023

Date Due: 11/29/2023

SOQs Received: 5

Firms that responded: Creative Planning Retirement Services, LPL Financial Retirement Partners, NPPFA Benefits, Retirement Plan Advisors, LLC, Wells Fargo Advisors

The selection criteria and weightings for project selection are indicated below.

- Review of the current investment structure, investment options and ongoing monitoring (30%). Review of the current investment structure and recommendations for consolidation of plans for
- Identification of the appropriate share class to be utilized for each investment option (15%). Identification of the appropriate share class to be utilized for each investment option
- Assistance with record-keeper review, benchmarking, and possible transition and consolidation (25%). Assistance with record-keeper review, benchmarking, and possible transition and consolidation
- Registration status of firm and advisors (10%). The firm must be registered with the U.S. Securities and Exchange Commission as an investment advisor under the Investment Company Act of 1940
- Cybersecurity coverage (20%). The firm must have adequate cybersecurity coverage