PHARR-SAN JUAN-ALAMO ISD
Administration Services (RFP# 18-19-017)
Proposals Received February 18, 2019; Effective Date May 1, 2019
Review Date: March 25, 2019

т					Recom	mendation
afeteria Plan						
General	Current			Renewal		
Company name	David K, Yo	ung Consul	ting LLC	David K. Y	oung Consul	ting LLC
Location	San Antonio	, TX		San Antoni	o, TX	
Contact Person	David K, Yo	ung		David K. Y	oung	
Local Representative	Bob Trevino	Insurance A	Agency	Bob Trevin	o Insurance A	Agency
Type of Entity	Limited Lial	oility Comp	any	Limited Lia	bility Compa	any
Financial Information	Yes			Yes		
Services						
Electronic Enrollment	Yes			Yes		
On-Site Enrollment	Yes, Local A	gent Pays I	?ee	Yes, Local	Agent Pays F	'ee
FSA Administration	Yes			Yes		
Debit Card	Yes			Yes		
Common Remittance	Yes, Local A	gent Pays I	<sup>7</sup> ee	Yes, Local	Agent Pays F	'ee
Cost	<u>Units</u>	Rate	Annual	Units	Rate	Annual
Set-Up	1		None	1		None
Enrollment	3,836		None	3,836		None
FSA Administration	25	\$1.25	\$285	25	\$1.25	\$285
Debit Card	25	\$5.50	\$1,254	25	\$5.50	\$1,254
Common Remittance	3,836	\$1,25	\$57,540	3,836	\$1.25	\$57,540
Total		,	\$59,079	*,,	42,00	\$59,079
Increase (Decrease)			400,070			433,013
SA Plan						
General						
Company name	David K. Yo	ung Consul	ting II C	David K. V	oung Consul	ting LLC
Location	San Antonio		ung LLC	San Antoni		ing LDC
Contact Person	David K, Yo			David K. Y		
Local Representative	No Informati			No Informa	17.55	
Type of Entity Financial Information	Limited Liab	iiity Compa	iny		bility Compa	iny
	Yes			Yes		
Services						
Roll-Over	Yes			Yes		
Loan Requests	Yes			Yes		
Hardship Withdrawals	Yes			Yes		
Contribution Limits	Yes			Yes		
Participant Annual Reports	Yes			Yes		
Plan Document	Yes			Yes		
Common Remittance	Yes			Yes		
Cost (see Comment)	<u>Units</u>	Rate	Annual	<u>Units</u>	Rate	Annual
Set-Up	1		Included	1	•	Included
Loans	15		Included	15		Included
Administration	1		Included	. 1		Included
Common Remittance	1,213	\$1.25	\$18,195	1,213	\$1.25	\$18,195
Total			\$18,195			\$18,195
Comment	Forms &	Common I	rator; Cafeteria Plan E Remittance Service Fee roducts Paid By Local	s For Forms o	& Common R	rator; Cafeteria Plan Election temittance Service Fees For roducts Paid By Local Agent

PHARR-SAN JUAN-ALAMO ISD
Administration Services (RFP# 18-19-017)
Proposals Received February 18, 2019; Effective Date May 1, 2019
Review Date: March 25, 2019

Cafeteria Plan							
General	Agent of Re	cord Servi	ces	Agent of Re	cord Servic	es	
Company name	Financial Be	nefit Servic	es	Lone Star In:	surance Ser	vices	
Location	Richardson,	TX		McAllen, T	ζ		
Contact Person	James Coby			Ruben Garza	1		
Local Representative	Gil Gonzale	S		Ruben Garza	ı		
Type of Entity	Limited Lial	bility Comp	any	Corporation			
Financial Information	No, Will Pro			No			
Services							
Electronic Enrollment	Yes			Yes			
On-Site Enrollment	Yes			Yes			
FSA Administration	Yes			Yes			
Debit Card	Yes			Yes			
Common Remittance	No Informat	ion		No Informati	ion		
Cost	Units	Rate	Annual	Units	Rate	Annual	
Set-Up	1	<u>Kate</u>	THUM	1	Kate	Autuai	
Enrollment	1			1		-	
FSA Administration	25			25	-		
Debit Card	23			23	-	-	
Common Remittance	3,836			2.026			
Total	3,830		S=2.	3,836	*		
			28			2	
Increase (Decrease)							
SA Plan							
General							
Company name	Financial Be		es	Lone Star Ins		vices	
Location	Richardson,	TX		McAllen, TX			
Contact Person	James Coby			Ruben Garza			
Local Representative	Gil Gonzales			Ruben Garza	Į.		
Type of Entity	Limited Liab			Corporation			
Financial Information	No, Will Pro	vide Upon A	Award	No			
Services							
Roll-Over	Yes			Yes			
Loan Requests	Yes			Yes			
Hardship Withdrawals	Yes			Yes			
Contribution Limits	Yes			Yes			
Participant Annual Reports	Yes			Yes			
Plan Document	Yes			Yes			
Common Remittance	Yes			Yes			
Cost (see Comment)	Units	Rate	Annual	<u>Units</u>	Rate	Annual	
Set-Up	1	190	Included	1	E .	Included	
Loans	15	596	Included	15		Included	
Administration	1	141	Included	1	2	Included	
Common Remittance	1,213	\$1.75	\$25,473	1,213	\$1.75	\$25,473	
Total			\$25,473			\$25,473	
Comment	Proposal Requires Agent of Record For Cafeteria Plan Administration; Subcontract With National Benefit Services For TSA Plan.			Plan Admin	Proposal Requires Agent of Record For Cafeteria Plan Administration; Subcontract With National Benefit Services For TSA Plan		

PHARR-SAN JUAN-ALAMO ISD
Administration Services (RFP# 18-19-017)
Proposals Received February 18, 2019; Effective Date May 1, 2019
Review Date: March 25, 2019

Company name Location West Jordan, UT Contact Person Gary W Southern Local Representative Type of Entity Financial Information  Electronic Enrollment On-Site Enrollment Person FSA Administration Debit Card Enrollment FSA Administration Penrollment Set-Up Financial Information FSA Administration Debit Card Common Remittance FSA Administration Debit Card Set-Up Farollment FSA Administration Debit Card FSA Administration FSA Administration Debit Card FSA Administration FSA Administration Debit Card FSA Administration FS	eteria Plan						
Location	General						
Contact Person							
Local Representative   Type of Entity   Limited Liability Company		West Jordan, UT					
Services							
Financial Information         Yes           Services         Electronic Enrollment         Yes           On-Site Enrollment         Yes         FSA Administration         Yes           Debit Card         Yes         Yes         Yes           Common Remittance         Yes         Yes <td></td> <td colspan="6">No Information</td>		No Information					
Services	1550 - 150	Limited Liab	lity Company	у			
Section   Sect	Financial Information	Yes					
On-Site Enrollment	Services						
FSA Administration	Electronic Enrollment	Yes					
Debit Card   Yes   Yes	On-Site Enrollment	Yes					
Ves	FSA Administration	Yes					
Set-Up	Debit Card	Yes					
Set-Up	Common Remittance	Yes					
Enrollment   3836	Cost	<u>Units</u>	Rate	Annual			
State	Set-Up	1	( <del>((</del> )	9			
Debit Card  Common Remittance  3836 \$1.30 \$59,842  Total  Total  Seo,892  Increase (Decrease)  A Plan  General  Company name  Location  Contact Person  Local Representative  Type of Entity  Financial Information  Services  Roll-Over  Loan Requests  Hardship Withdrawals  Participant Annual Reports  Plan Document  Common Remittance  Cost (see Comment)  Loans  Loan Remittance  Loans  Loan Rate  Loans  Loans	Enrollment	3836	126				
Common Remittance Total	FSA Administration	25	\$3.50	\$1,050			
Total Increase (Decrease)  A Plan  General Company name Location Local Representative Type of Entity Financial Information Services Roll-Over Loan Requests Hardship Withdrawals Contribution Limits Participant Annual Reports Plan Document Common Remittance Cost (see Comment) Set-Up Loans A Plan  National Benefit Services  National Benefit Services  National Benefit Services  Loary W Southern No Information Limited Liability Company Yes  Ves Loan Requests Yes Hardship Withdrawals Yes Contribution Limits Yes Participant Annual Reports Plan Document Yes Common Remittance 1 - Included Loans 1 - Included Administration 1 - Included Common Remittance 1,213 \$1.75 \$25,473	Debit Card	25	74				
Total Increase (Decrease)  A Plan  General Company name Location Local Representative Type of Entity Financial Information Services Roll-Over Loan Requests Hardship Withdrawals Contribution Limits Participant Annual Reports Plan Document Common Remittance Cost (see Comment) Set-Up Loans A Plan  National Benefit Services  National Benefit Services  National Benefit Services  Loary W Southern No Information Limited Liability Company Yes  Ves Loan Requests Yes Hardship Withdrawals Yes Contribution Limits Yes Participant Annual Reports Plan Document Yes Common Remittance 1 - Included Loans 1 - Included Administration 1 - Included Common Remittance 1,213 \$1.75 \$25,473	Common Remittance						
Increase (Decrease)  A Plan  General  Company name  Location  Contact Person  Local Representative  Type of Entity  Financial Information  Services  Roll-Over  Loan Requests  Hardship Withdrawals  Participant Annual Reports  Plan Document  Common Remittance  Cost (see Comment)  Set-Up  Loans  A Plan  National Benefit Services  National Benefit Services  National Benefit Services  National Benefit Services  Loany W Southern  No Information  Limited Liability Company  Yes  Yes  Ves  Loan Requests  Yes  Contribution Limits  Yes  Participant Annual Reports  Yes  Common Remittance  Yes  Cost (see Comment)  1 - Included  Administration  1 - Included  Loans  Administration  1 - Included  Common Remittance  1,213 \$1.75 \$25,473	Total						
General Company name National Benefit Services Location West Jordan, UT Contact Person Gary W Southern Local Representative Type of Entity Limited Liability Company Financial Information Services Roll-Over Yes Loan Requests Hardship Withdrawals Contribution Limits Participant Annual Reports Plan Document Common Remittance Yes Cost (see Comment) Set-Up 1 - Included Loans Administration 1 - Included Common Remittance 1,213 \$1.75 \$25,473	Increase (Decrease)			***,***			
General Company name National Benefit Services Location West Jordan, UT Contact Person Gary W Southern No Information Type of Entity Limited Liability Company Financial Information Yes Services Roll-Over Yes Loan Requests Yes Hardship Withdrawals Contribution Limits Yes Participant Annual Reports Plan Document Yes Common Remittance Cost (see Comment) Set-Up Loans Administration 1 - Included Administration 1 - Included Common Remittance 1,213 \$1.75 \$25,473							
Company name Location West Jordan, UT Contact Person Gary W Southern No Information Type of Entity Financial Information Services Roll-Over Loan Requests Hardship Withdrawals Contribution Limits Participant Annual Reports Plan Document Common Remittance Cost (see Comment) Set-Up Loans Administration  National Benefit Services West Jordan, UT Gary W Southern No Information Ves							
Location Contact Person Gary W Southern  Local Representative No Information Type of Entity Financial Information Services Roll-Over Loan Requests Hardship Withdrawals Contribution Limits Participant Annual Reports Plan Document Common Remittance  Cost (see Comment) Set-Up Loans Administration Limits Pincluded Loans Administration Limits Pincluded Loans Limited Liability Company Financial Information Limited Liability Company Yes  Yes  Ves  Yes  Ves  Ves  Annual Lincluded Loans Lincluded Lin		National Ran	ofit Sarvicos				
Contact Person Local Representative No Information Limited Liability Company Financial Information  Services Roll-Over Loan Requests Hardship Withdrawals Contribution Limits Participant Annual Reports Plan Document Common Remittance  Cost (see Comment) Set-Up Loans Administration Limits Pinancial Information  Gary W Southerm No Information  Yes  Yes  Yes  Yes  Yes  Yes  Yes  Plan Document Yes  Cost (see Comment) 1 - Included  Administration 1 - Included  Loans Administration 1 - Included  Loamon Remittance  1,213 \$1.75 \$25,473							
Local Representative Type of Entity Limited Liability Company Financial Information  Services Roll-Over Yes Loan Requests Hardship Withdrawals Contribution Limits Participant Annual Reports Plan Document Common Remittance  Cost (see Comment) Set-Up Loans Administration Limits Pinancial Information Limits Yes Ves Ves Ves Ves Ves Ves Ves Ves Ves V							
Type of Entity Financial Information  Services  Roll-Over Loan Requests Hardship Withdrawals Contribution Limits Participant Annual Reports Plan Document Common Remittance  Cost (see Comment) Set-Up Loans Administration Limited Liability Company Yes Yes  Yes  Yes  Yes  Loan Requests Yes  Yes  Yes  Loan Requests Yes  Yes  Participant Annual Reports Yes  Loan Remittance Yes  Loan Lincluded Loan							
Financial Information  Services  Roll-Over  Loan Requests  Hardship Withdrawals  Contribution Limits  Participant Annual Reports  Plan Document  Common Remittance  Yes  Cost (see Comment)  Set-Up  1 - Included  Loans  15 - Included  Administration  1 - Included  Common Remittance  1,213 \$1.75 \$25,473							
Services         Roll-Over         Yes           Loan Requests         Yes           Hardship Withdrawals         Yes           Contribution Limits         Yes           Participant Annual Reports         Yes           Plan Document         Yes           Common Remittance         Yes           Cost (see Comment)         Units         Rate         Annual           Set-Up         1         -         Included           Loans         15         -         Included           Administration         1         -         Included           Common Remittance         1,213         \$1.75         \$25,473			my Company				
Roll-Over         Yes           Loan Requests         Yes           Hardship Withdrawals         Yes           Contribution Limits         Yes           Participant Annual Reports         Yes           Plan Document         Yes           Common Remittance         Yes           Cost (see Comment)         Units         Rate         Annual           Set-Up         1         -         Included           Loans         15         -         Included           Administration         1         -         Included           Common Remittance         1,213         \$1.75         \$25,473		res					
Loan Requests  Hardship Withdrawals  Contribution Limits  Participant Annual Reports  Plan Document  Common Remittance  Yes  Cost (see Comment)  Set-Up  1 - Included  Loans  15 - Included  Administration  1 - Included  Common Remittance  1,213 \$1.75 \$25,473		W-					
Hardship Withdrawals   Yes							
Contribution Limits         Yes           Participant Annual Reports         Yes           Plan Document         Yes           Common Remittance         Yes           Cost (see Comment)         Units Rate Annual           Set-Up         1 - Included           Loans         15 - Included           Administration         1 - Included           Common Remittance         1,213 \$1.75 \$25,473							
Participant Annual Reports         Yes           Plan Document         Yes           Common Remittance         Yes           Cost (see Comment)         Units         Rate         Annual           Set-Up         1         -         Included           Loans         15         -         Included           Administration         1         -         Included           Common Remittance         1,213         \$1.75         \$25,473							
Plan Document         Yes           Common Remittance         Yes           Cost (see Comment)         Units         Rate         Annual           Set-Up         1         -         Included           Loans         15         -         Included           Administration         1         -         Included           Common Remittance         1,213         \$1.75         \$25,473							
Common Remittance         Yes           Cost (see Comment)         Units         Rate         Annual           Set-Up         1         -         Included           Loans         15         -         Included           Administration         1         -         Included           Common Remittance         1,213         \$1.75         \$25,473							
Cost (see Comment)         Units         Rate         Annual           Set-Up         1         -         Included           Loans         15         -         Included           Administration         1         -         Included           Common Remittance         1,213         \$1.75         \$25,473		Yes					
Set-Up         1         -         Included           Loans         15         -         Included           Administration         1         -         Included           Common Remittance         1,213         \$1.75         \$25,473	Common Remittance	Yes					
Loans         15         - Included           Administration         1         - Included           Common Remittance         1,213         \$1.75         \$25,473	Cost (see Comment)	<u>Units</u>	Rate	Annual			
Administration         1         -         Included           Common Remittance         1,213         \$1.75         \$25,473	Set-Up	1		Included			
Common Remittance 1,213 \$1.75 \$25,473	Loans	15		Included			
	Administration	1	( <b>*</b> )	Included			
Total \$25,473	Common Remittance	1,213	\$1.75	\$25,473			
	Total			\$25,473			