

Upper Merion Township is issuing an RFP for our Defined Contribution Plans in accordance with Act 44. We are looking for Plan Providers to submit their proposal with onsite education services and without, as well as looking for third party providers that will only provide independent educational services. The Plan Provider portion of the RFP will be issued through RPAG. If you did not receive the original RFP and would like to be added or are not participating on the RPAG RFP system and would like instructions on how to be added to the system, please contact our third-party independent fiduciary, Patrick Geary, AIF®.

The issuance of this RFP in no way constitutes a contract nor does it guarantee that any changes will be made to the current provider, it does not compel Upper Merion to make any changes but is meant to provide the information required to make a sound fiduciarily based decision for the future of the plans.

Release: 8/19

Deadline for submission of questions: 9/1

Deadline for Proposals: 9/16

Finalists, on-site or virtual: week of 10/17 thru 10/20

If a new provider is selected the transition target date is 1/01/2023

Once the RFP is issued, no provider is permitted to contact any employee or board member of Upper Merion. Such unauthorized contact may disqualify your company from this contract.

The Independent educational/financial planning services will be a separate RFP that can be requested by contacting Patrick Geary, AIF®. MR. Geary can be reached at pgeary@cwais.net or 814.315.2000 for additional questions.

Please return the completed educational/financial planning RFP to Patrick Geary and copy to Sibyl Bryant at sbryant@umtownship.org