

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

		Recommendation		
Cafeteria Plan				
General	Current	Renewal		
Company name	David K. Young Consulting LLC	David K. Young Consulting LLC		
Location	San Antonio, TX	San Antonio, TX		
Contact Person	David K. Young	David K. Young		
Local Representative	Bob Trevino Insurance Agency	Bob Trevino Insurance Agency		
Type of Entity	Limited Liability Company	Limited Liability Company		
Financial Information	Yes	Yes		
Services				
Electronic Enrollment	Yes	Yes		
On-Site Enrollment	Yes, Local Agent Pays Fee	Yes, Local Agent Pays Fee		
FSA Administration	Yes	Yes		
Debit Card	Yes	Yes		
Common Remittance	Yes, Local Agent Pays Fee	Yes, Local Agent Pays Fee		
Cost	Units 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 <u>\$57,540</u>	3,836	\$1.25	<u>\$57,540</u>
Total				\$59,079
Increase (Decrease)				
TSA Plan				
General				
Company name	David K. Young Consulting LLC	David K. Young Consulting LLC		
Location	San Antonio, TX	San Antonio, TX		
Contact Person	David K. Young	David K. Young		
Local Representative	No Information	No Information		
Type of Entity	Limited Liability Company	Limited Liability Company		
Financial Information	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)	Units Rate Annual	Units	Rate	Annual
Set-Up	1 - Included	1	-	Included
Loans	15 - Included	15	-	Included
Administration	1 - Included	1	-	Included
Common Remittance	1,213 \$1.25 <u>\$18,195</u>	1,213	\$1.25	<u>\$18,195</u>
Total				\$18,195
Comment	Independent Administrator; Cafeteria Plan Election Forms & Common Remittance Service Fees For Personal Insurance Products Paid By Local Agent.	Independent Administrator; Cafeteria Plan Election Forms & Common Remittance Service Fees For Personal Insurance Products Paid By Local Agent.		

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Cafeteria Plan						
General	Agent of Record Services			Agent of Record Services		
Company name	Financial Benefit Services			Lone Star Insurance Services		
Location	Richardson, TX			McAllen, TX		
Contact Person	James Coby			Ruben Garza		
Local Representative	Gil Gonzales			Ruben Garza		
Type of Entity	Limited Liability Company			Corporation		
Financial Information	No, Will Provide Upon Award			No		
Services						
Electronic Enrollment	Yes			Yes		
On-Site Enrollment	Yes			Yes		
FSA Administration	Yes			Yes		
Debit Card	Yes			Yes		
Common Remittance	No Information			No Information		
Cost	Units	Rate	Annual	Units	Rate	Annual
Set-Up	1	-		1	-	-
Enrollment						
FSA Administration	25	-	-	25	-	-
Debit Card						
Common Remittance	3,836	-	-	3,836	-	-
Total			-			-
Increase (Decrease)						
TSA Plan						
General						
Company name	Financial Benefit Services			Lone Star Insurance Services		
Location	Richardson, TX			McAllen, TX		
Contact Person	James Coby			Ruben Garza		
Local Representative	Gil Gonzales			Ruben Garza		
Type of Entity	Limited Liability Company			Corporation		
Financial Information	No, Will Provide Upon 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	Units	Rate	Annual
Set-Up	1	-	Included	1	-	Included
Loans	15	-	Included	15	-	Included
Administration	1	-	Included	1	-	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.			Proposal Requires Agent of Record For Cafeteria Plan Administration; Subcontract With National Benefit Services For TSA Plan		

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Cafeteria Plan			
General			
Company name	National Benefit Services		
Location	West Jordan, UT		
Contact Person	Gary W Southern		
Local Representative	No Information		
Type of Entity	Limited Liability Company		
Financial Information	Yes		
Services			
Electronic Enrollment	Yes		
On-Site Enrollment	Yes		
FSA Administration	Yes		
Debit Card	Yes		
Common Remittance	Yes		
Cost	Units	Rate	Annual
Set-Up	1	-	-
Enrollment	3836	-	-
FSA Administration	25	\$3.50	\$1,050
Debit Card	25	-	-
Common Remittance	3836	\$1.30	\$59,842
Total			\$60,892
Increase (Decrease)			
TSA Plan			
General			
Company name	National Benefit Services		
Location	West Jordan, UT		
Contact Person	Gary W Southern		
Local Representative	No Information		
Type of Entity	Limited Liability Company		
Financial Information	Yes		
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
Total			\$25,473
Comment			