Vendors must satisfy each of the following minimum mandatory qualifications for this RFP in order to be given further consideration. Proposals from vendors who fail to meet these qualifications or fail to provide complete information will not be considered for award. Please answer “YES” or “NO” where indicated. If evidence is requested, please provide complete documentation.

This page must be signed and sent with the Proposal.

|  |  |
| --- | --- |
| REQUIREMENT | COMPLIANCE |
| * + 1. An established records system developed for servicing of prepaid tuition and all related online portals in conformance with IRS Section 529 regulations. | Yes  No |
| * + 1. A minimum of five years experience in comprehensive account servicing for an IRS Section 529 qualified prepaid tuition program. | Yes  No |
| * + 1. Experience with operational activities to wind down an IRS Section 529 qualified prepaid tuition program. | Yes  No |

Name of Vendor:

Signature of Vendor:

Date signed: Click or tap to enter a date.