

**FINANCIAL EDUCATION SERVICES FOR THE FRS INVESTMENT PLAN - ITN
RESPONSES TO REQUESTS FOR CLARIFICATION**

	Solicitation Section	Question	Response
1	ITN Section 8.1, Intent to Respond	Can the SBA please confirm that they are requesting vendors include a cover letter (8.1.3) and financial information and SOC report (8.1.4) in the Intent to Respond submitted by April 14? Or would SBA prefer that information be included in the response package to the ITN?	The intent to respond, as well as the final response package to the ITN must include the documents listed.
2	Exhibit 2, Services Questionnaire	Exhibit 2, Question 17 asks for the name and phone number of five current or recent clients who will serve as references. At the end of the Exhibit 2, before the signature block, SBA asks for more detailed information for three references. Can SBA please verify the number of references required and if the same clients can be used in both sections?	For Question 17, please list the references as indicated. The reference request before the signature provides a more detailed account of three references. The same references can appear in both sections.
3	Exhibit 4	Exhibit 4 states that respondents are encouraged to provide the SBA with their most competitive price offered to large institutions. For many vendors, structuring the most competitive price often involves use of a fixed-fee pricing model to reduce uncertainty and fluctuations over time. Would SBA be amenable to vendors only completing the no minimum/maximum total flat fee pricing table and not the number of calls/total per member fee table in Exhibit 4?	Completing the no minimum/maximum total flat free pricing table only is acceptable.

4	Exhibit 2, General Survey Information, Question 3	Can the SBA please confirm it would like respondents to present workshop information only for calendar year 2018, or would SBA prefer statistics from a more recent year or range of years?	Please provide statistics for the 2024 and 2025 calendar year.
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