



## Proposal Opening Record

Date of opening: March 16, 2023

Sourcewell posted Request for Proposal #031623, for the procurement of Employee Financial Wellness Programming and Related Employer-Sponsored Financial Solutions, on the Sourcewell Procurement Portal [[portal.sourcewell-mn.gov](http://portal.sourcewell-mn.gov)] on Thursday, January 26, 2023, and the solicitation remained in an open status within the portal until March 16, 2023, at 4:30 pm CT. The RFP required that all proposals be submitted through the Sourcewell Procurement Portal no later than 4:30 pm CT on March 16, 2023, the date and time specified in the Solicitation Schedule.

The undersigned certify that all responses received on Request for Proposal #031623 were submitted through the Sourcewell Procurement Portal, and that each Proposer's response material was digitally sealed upon submission and remained inaccessible until the due date and time specified in the Solicitation Schedule.

Responses were received from the following:

Alliant Insurance Services (LifeBalance Program) - Submitted 3/16/23 at 2:05:34 PM  
Arthur J. Gallagher & Co. - Submitted 3/16/23 at 1:07:35 PM  
BMG Money, Inc. - Submitted 3/16/23 at 12:18:26 AM  
BrightPlan, LLC - Submitted 3/15/23 at 1:44:15 PM  
CreditWorks, LLC - Submitted 3/16/23 at 10:04:40 AM  
Ernst & Young, LLP - Submitted 3/16/23 at 11:21:53 AM  
Fidelity Workplace Services - Submitted 3/16/23 at 4:20:08 PM  
iGrad, Inc. - Submitted 3/16/23 at 11:51:53 AM  
Kashable, LLC - Submitted 3/16/23 at 10:54:03 AM  
Silver Lion Student Loan Advisors, LLC - Submitted 3/16/23 at 12:41:45 PM  
Summer PBC - Submitted 3/16/23 at 3:18:19 PM  
Tuition.io, Inc. - Submitted 3/16/23 at 12:57:11 PM  
WEX Health, Inc. - Submitted 3/15/23 at 10:23:41 PM

The Proposals were opened electronically, and a list of all Proposers was made publicly available in the Sourcewell Procurement Portal, on March 16, 2023, at 4:31:34 PM CT. All responsive proposals were then submitted for review by the Sourcewell Evaluation Committee.

DocuSigned by:  
*James Voelker*  
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James Voelker, CPCM, CFCM, Procurement Lead Analyst

DocuSigned by:  
*Carol Jackson*  
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Carol Jackson, Procurement Analyst