

Proposal For: Pension Plan Services Provider (two plans)

Services Provided For: Uniform Pension/Defined Benefit and Non-Uniform Pension/Defined Benefit

The purpose of this correspondence is to formally notify all applicants that submitted a proposal under the Request for Proposal ("RFP") to Amity Township regarding the provision of pension benefit service.

After careful consideration of all information presented, a detailed review and analysis process, and the narrowing of a very competitive field of highly qualified applicants, the Board of Supervisors of Amity Township, Pennsylvania wishes to announce the selection as the most qualified applicant and designation as the selection for the Award of the Professional Services contract to:

CBIZ INVESTMENT ADVISORY SERVICES, LLC

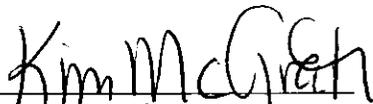
SUMMARY OF EVENTS: Amity Township's RFP was advertised with a September 15, 2025 submittal deadline. There were six (6) applications for the professional services contract. We received submittals from:

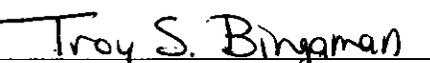
1. CBIZ Investment Advisory Services, LLC
2. Conrad Siegel
3. Fulton Financial Advisors
4. Girard Pension Services, LLC
5. PFM Asset Management
6. Principal Custody Solutions

CHIEF ADMINISTRATIVE OFFICER: Following is a summary for the basis of the award by the pension committee in selecting CBIZ Investment Advisory Services, LLC as the most qualified:

1. CBIZ's proposal was complete and adhered to the instructions in the RFP. The proposal and accompanying documents were simple, clear, concise and demonstrated an understanding of the unique long-term investment needs of Amity Township.
2. CBIZ currently provides pension advisory services to approximately 134 municipalities in Pennsylvania, providing both investment advisory and actuarial services to each.
3. CBIZ currently manages Amity Township's voluntary 457 Plan for all employees.
4. CBIZ proposed an index fund approach to investments that reduces our pension (and subsequently our MMO) expenses.
5. CBIZ will be appointing one person as the contact for our two pension plans.
6. CBIZ has proposed a wrap fee basis for all services provided.
7. CBIZ's overall fees were the lowest proposed of the proposals received.
8. CBIZ is a leading provider of financial and advisory services with a personalized, local approach as evidenced in our current relationship.
9. Our staff was pleased with the information received and our interaction with CBIZ's staff to date.


Senior Member of the Selection Process

 10/1/25
Signature and Date


Chief Administrative Officer

 10/1/25
Signature and Date