

**GOVERNMENT OF THE DISTRICT OF COLUMBIA  
OFFICE OF THE CHIEF FINANCIAL OFFICER  
DETERMINATION AND FINDINGS  
FOR  
CONTRACTOR'S RESPONSIBILITY**

**AGENCY:** Office of Finance and Treasury (OFT)

**CONTRACT NO:** CFOPD-23-C-012

**CONTRACTOR:** Segal Marco Advisors.

**CAPTION:** Benefit Plans Consulting Services – 401(a) & 457

**1. AUTHORIZATION:**

Financial Management and Control Order No.15-14, Section 1006

**2. MINIMUM REQUIREMENTS:**

The District of Columbia Office of the Chief Financial Officer, Office of Contracts, on behalf of Office of Finance & Treasury (OFT) (the “District”) requires the Contractor to provide expert advisory services and project execution assistance for its, 401(a) Defined Contribution Plan and 457(b) Deferred Compensation Plan.

**3. ESTIMATED REASONABLE COST:**

The estimated contract total price is in the Not to Exceed amount of \$900,000.00.

**4. FACTS WHICH JUSTIFY CONTRACTOR'S RESPONSIBILITY:**

The contractor has:

- (a) Have or provide evidence that it can obtain the financial, technical, and organizational skills and resources, and the facilities and equipment, necessary to perform the contract in accordance with its terms;
- (b) Have a satisfactory performance record;
- (c) Have a satisfactory record of integrity and business ethics;
- (d) Not be suspended, debarred, or otherwise ineligible to receive contracts from the District Government or the Federal Government;
- (e) Meet any other qualification criteria that may be imposed by applicable laws or regulations; and

(f) Provide adequate evidence that it has paid all applicable District of Columbia and Federal taxes and filed District and Federal tax returns.

5. **CERTIFICATION BY THE CONTRACT SPECIALIST:**

I hereby certify that the above findings are correct and complete to the best of my knowledge.

6/15/2023  
Date

*Yemashet Kebede*  
Yemashet Kebede  
Contract Specialist

**DETERMINATION:**

Based on the above findings, it is hereby determined that the Contractor is responsible in accordance with the applicable regulations set forth above and award of the proposed contract action with **Segal Marco Advisors** is in the best interest of the Government of the District of Columbia.

June 15, 2023  
Date

*Anthony A. Stover*  
Anthony A. Stover  
Contracting Officer