

PROPOSAL NAME/NUMBER: 26-506-07-20 / Employee Benefit Plans

OPEN DATE: July 20, 2026 10:00 AM CST



Vendor Name:

Street address:

City, State:

Phone:

Fax:

Contact:

Email:

Ameritas	True Path Sourcing	Metropolitan Life Insurance Company	UMR, Inc.	Blue Cross Blue Shield	VerusRx	Assured Benefits Administrators, Inc.	Curative Insurance Company	S&A Chtata Enterprises, LLC. Dba Overt Stop Loss
5900 O' Street Lincoln, NE 68510 (402) 309-2524	2405 Mustang Drive Grapevine, TX 76051 (919) 485-9171	200 Park Avenue New York, NY 10166 (713) 204-3475	115 W. Wausau Ave. Wausau, WI 54401 (800) 826-9781	8101 W. Sam Houston Pkwy S Houston, TX 77072 (972) 766-6900	Dallas, TX	12221 Merit Drive # 1800 Dallas, TX 75251 (800) 741-2114	900 Congress Ave., Ste. 500 Austin, TX 78701 (855) 428-7248	17806 W. IH10, Ste. 300 San Antonio, TX 78257 (210) 845-5053
Bruce E. Mieth, Ph.D., SVP bmieth@ameritas.com	Ken Rostkowski krostkowski@truepathsourcing.com	Brennan Nugent, VP jmorris4@metlife.com	Brian Freiberg, Pres. umr-rfp@umr.com	Brandi Clancy brenda_orellana@bcbstx.com		Jesse Beck jbeck@abadmin.com	John Bock	Stephanie Chtata schtata@overtstoploss.com

DESCRIPTION OF FORMS:

Solicitation Signed	Yes	Yes	Yes	Yes	Yes (Electronic)	Not completed	Yes	Yes (Electronic)	Yes
Terms & Conditions Included	Partial	Partial	Partial	Partial	Partial	Partial	Partial	Partial	Yes
Form 5 Non-Collusive Bidding Certification	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (Electronic)	Yes
Form 4 Felony Conviction Notification	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (Electronic)	Yes
Form 6 S.B. 252 Certification	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes (Electronic)	Yes
Release of Financial Information	Yes	Not Signed, referencing to W-9	Yes	Yes	Yes	Yes	Upon being finalist	Yes (Form not completed) Referred to Financial Stability Information (Electronic)	Will provide upon award
H.B. 89 Verification	Yes	Yes	Yes	Yes	Yes (Electronic)	Yes	Yes	Yes (Electronic)	Yes
Boycott of Energy Companies and Firearm Entity Discrimination	Yes	Yes	Yes	Yes	Yes (Electronic)	Yes	Yes	Yes (Electronic)	Yes
Compensation and Independence Disclosure Form	Not Submitted	Yes	Yes	Yes	Yes (Electronic)	Not Signed	Not Completed	Yes (Electronic)	Yes
Vendor Response Questionnaire	Not Submitted	Yes (Electronic)	Not Submitted	Yes	Yes (Electronic)	Yes (Electronic)	Yes (Electronic)	Yes (Electronic)	Yes (Electronic)
Gen. Business Questionnaire	Yes	Yes	Yes	Yes	Yes (Electronic)	Yes	Yes	Yes (Electronic)	Yes
References	Upon Request	Yes	Not Submitted	Yes	Incumbent provider-no references submitted; current City performance history considered	Yes	Yes	Not Submitted	Yes
Addenda(s)	Submitted #2 only (Electronic)	Yes (#1,)	Submitted #2 only	Yes (#1,)	Yes (#1,) (Electronic)	Submitted #1 only	Not Submitted	Yes (#1,) (Electronic)	Yes (#1,)
Price Proposal	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
USB Drive	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Please Note: Ameritas, Metropolitan Life Insurance, VerusRx, and Assured Benefits Administrators were determined to be non-responsive for failure to submit critical forms and documentation identified as mandatory submission

(Electronic) = forms were submitted electronically on USB.