

**REVIEW AND APPROVAL REQUESTED FOR:**

☒ Contract ☐ Amendment ☒ Resolution ☐ Ordinance ☐ Policy ☐ Other

**County Counsel  
REVIEW ROUTING SHEET**

Date Prepared: 3/19/25Need Date: 3/26/25**PROCESSING DEPARTMENT**

Department: Treasurer-Tax Collector  
Dept Contact: Kandis Baldwin  
Phone: x 5802  
Dept. Signature: Karen E. Coleman  
Title: Treasurer-Tax Collector

Org Code: 0400000  
Funding Source: \_\_\_\_\_  
PL String: \_\_\_\_\_  
Legistar #: 25-0581

**CONTRACT INFORMATION**

CONTRACT #: TBD CONTRACT AMENDMENT #: \_\_\_\_\_

Contracting Department: Treasurer-Tax Collector  
Contractor/Vendor Name: Nationwide  
Contract Term: 5 yrs, w/5 1yr renew Contract Value: 0

*Note - HR & RISK review will take place during Fenix Contract workflow - amendments see below.*

**ORDINANCE/RESOLUTION/POLICY INFORMATION**

TITLE / SUBJECT: 401(A) Deferred Comp. Plan for Eligible Employees  
NUMBER (If Assigned): \_\_\_\_\_

**DESCRIPTION AND ADDITIONAL NOTES FOR COUNTY COUNSEL**

Administrative Service Agreement with Nationwide to provide recordkeeping and administrative services for the 457(b) Deferred Comp Plan, Social Security Replacement Plan for Part-Time, Seasonal & Temp Employees (OBRA Plan) and 401(a) Deferred Comp Plan.

**COUNTY COUNSEL**

Approved ☒ Disapproved ☐ Date: 3/20/25 By: Janeth D. SanPedro  
Approved ☐ Disapproved ☐ Date: \_\_\_\_\_ By: \_\_\_\_\_

**COMMENTS**

Reviewed Resolution and the exhibits establishing 401(a) Plan and Nationwide Admin Service Agreement, with edits as noted.

**CONTRACT AMENDMENT ONLY****HR APPROVAL**

Compliance with Human Resources requirements? Yes: ☐ No: ☐  
Compliance verified by: \_\_\_\_\_

**RISK APPROVAL**

Approved ☐ Disapproved ☐ Date: \_\_\_\_\_ By: \_\_\_\_\_  
Approved ☐ Disapproved ☐ Date: \_\_\_\_\_ By: \_\_\_\_\_

**COMMENTS**