Attachment "D"

FIRM QUESTIONNAIRE

1. Name and address of parent company.

TASC (Total Administrative Services Corporation)
2302 International Ln
Madison, WI 53704

2. How long has the company been in business?

Since 1975… 46 years.

3. Provide the most recent A.M. Best or Standard & Poor's rating for your company.

Not applicable. TASC not an insurance carrier nor are we a bank. We are a third-party administrator of employee benefits and thus not rated by firms established to evaluate credit worthiness of financial/insurance entities.

However, TASC has provided its **CONFIDENTIAL** Financial Statements as a separate attachment to show TASC's financial strength.

4. Name and address of local office. What is the size of your local staff?

TASC has local, regional and national offices strategically located throughout the country to support the needs of our clients. TASC has a workforce of over 1,200 fulltime employees that assists as needed on client cases. Our New Orleans Regional Sales Director office will be used to support JPG.

5. Provide a resume for each key employee in your organization who will be handling theJPG account.

Please the following next few pages.

DERRICK DANIEL

Vice President, Public Sector Sales

404-908-5907

derrick.daniel@tasconline.com

Education

Florida A&M University
BS – Business Administration

Mt. San Jacinto College, California
AA – Social & Behavioral Sciences

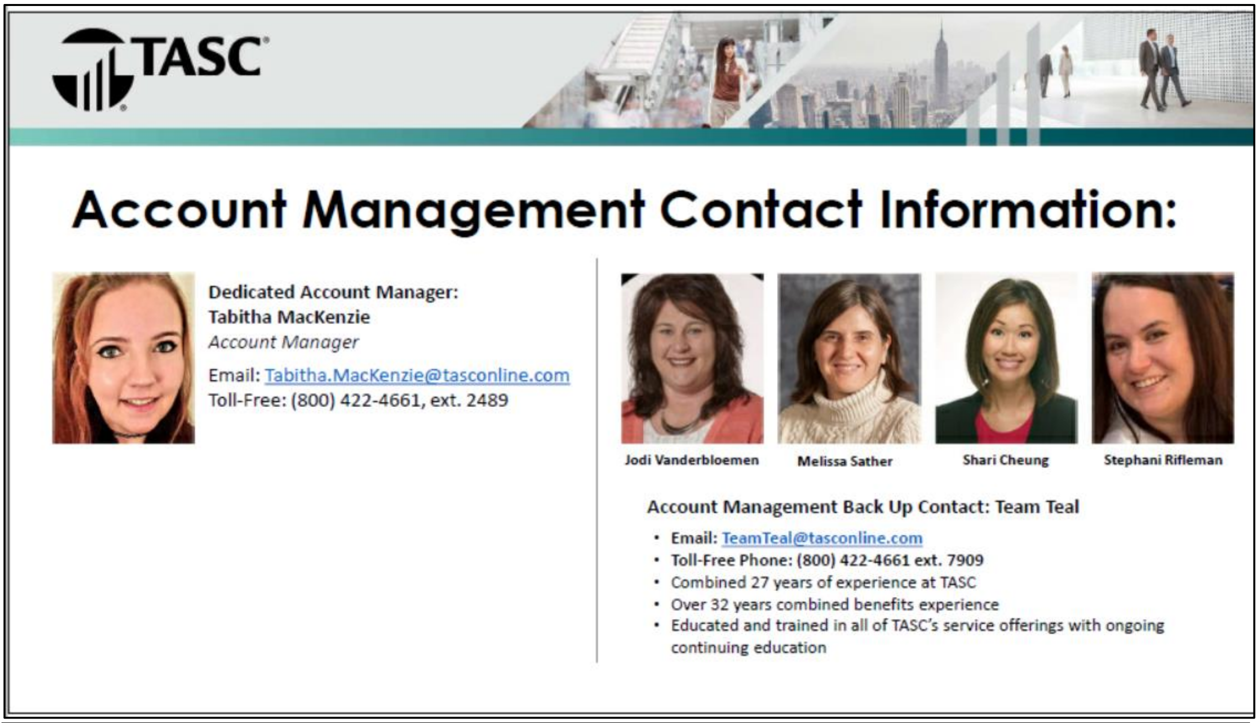
Cumberland University, Tennessee
Criminal Justice & Public Administration

Derrick is Vice President, Public Sector Sales. He has 15 years of VP experience in the Public Sector employee benefits arena and his expertise is in strategy, negotiations, RFPs, presentations, pricing and BAFOs. Derrick is proficient in planning, coordinating and managing business operations. His skillset includes expertise in FSAs, HRAs, HSAs, COBRA, Retiree Billing, ACA Compliance, HIPAA, LOA, FMLA, Voluntary Benefits, Core Benefits, Self-Funded, Full Insured, Online Enrollment Systems, etc.

Derrick joined TASC in 2017 from 360 Accounting where he was Vice President of Sales and Biz Dev. Prior to that, he worked at FBMC Benefits Management (Fringe Benefits Management Company) servicing public sector clients throughout the country for their employee benefits needs.

Derrick identifies and develops strategic relationships with partners and potential customers. He is a change agent who works well across business units gaining support, building allegiances and aligning advocates.

Derrick's principle areas of practice are in Revenue Optimization/P&L, Sales Strategy, Presentations/Demos, Product Development, Product Pricing, Requests for Proposals, Contract Negotiation, Consultant/Broker, Third Party Administration Services, Employee Benefits, Competitor Analysis, Market Research, Relationship Building, Division Management, Problem Solving/Data Analytics, Website Relaunch, Marketing Materials, Conferences/Trade Shows, Territory Development, Rep Training/Script Writing, and Question Based Selling (QBS).



Name of Account Manager:	Tabitha MacKenzie
Location Address (Street, City, State, Zip):	Remote
Number of Years with your Organization:	2.5
Number of Years' Experience in Industry:	12 years
Briefly describe this person's scope of responsibility:	Tabitha MacKenzie is your Primary Account Manager and Point of Contact. Tabitha will respond to JPG requests and ensure all aspects of JPG's business are executed as required, engaging others in the TASC organization, as needed. Tabitha will proactively share important information impacting your benefits accounts. To ensure the highest levels of service, Tabitha is supported by a team of four peers, collectively known as "Team Teal." All team members are kept informed of JPG's needs and cross-trained on its unique requirements.
Total Number of Current Clients:	10
Average Size of Clients (e.g., <1000; 1000-4999; 5000-10,000 lives):	Largest client = 13,000 lives

Jeremy Evans

New Orleans, LA • (504) 266-5783

Sales Professional

Well-trained sales representative offering vast experience in superb customer service, excellentinterpersonal communication skills and the organizational savvy to operate in an assigned territory smoothly. A very strong problem-solver, accompanied with excellent time managementskills along with proven success in sales.

EXPERIENCE:

Regional Sales Director
Total Administration Services Corporation
2020- Present *New Orleans, LA*

- Coordinate and functionally supervises all activities relating to the sale of all company services through relationships with accounts and through independent insurance and other financial professionals (Distributors) who provide professional services to businessclients of all sizes.
- Primary responsibilities to successfully establish, maintain, and enhance credibility, communications, and relationships with Distributors and accounts to establish newcustomer relationships.

Retirement Sales Rep
Paychex Inc. *New Orleans, LA*
April 2016 – Jan 2020

- Sell our retirement services to our existing clients (401k and IRA's)
- Meet with 10-15 business owners and decision makers weekly.
- Educate Financial Advisors and CPAs on the plan design and implementation.
- **Closed Largest Plastic Surgeon office in New Orleans Dr. Ali Sadeghi-2016**
- **#1 Paychex rep in the New Orleans Market 2017-2019**
- **#1 District Sales Leader 2018 selling 5, 401k accounts June 2018-Present**
- **#1 in the New Orleans Market for selling 401k 2018-2019**
- **Closed Largest Chiropractic Office in New Orleans November 2018**
- **Closed Largest Law Firm in New Orleans January 2019**

Territory Sales Rep
Grainger Industrial *New Orleans, LA*
April 2014 – April 2016

- Made key decisions to grow sales for medium-sized customers.
- Responsible for optimizing call routes to maximize time in the field and overall efficiency
- Maximized revenue and profits within assigned geography by selling to existingcustomers and acquiring new business
- **Closed Over 60k in Accounts in September 2015**
- **Grew territory to 150%-200% quota from 2015-2016**
- **Awarded District Sales Team Leader 2016**

Branch Manager
Enterprise Holdings LLC *New Orleans, LA*
December 2010 – April 2014

- Promoted to Branch Manager in two years; 3 promotions
- Grew branch goals
- Managed multi-million-dollar operation with a fleet of 260 cars, established strategies forimproved cost control.
- Measured the effectiveness of marketing, advertising, and communications programsand strategies.

EDUCATION:

Bachelor of Science, Biology-2010Northwestern State

6. **Where is your customer service office located?**

The pandemic has most of our staff remote. Our Customer Service Call Center is located in Madison, WI.

7. **Describe the account management services and the team that would be responsible forhandling the Parish account.**

Tabitha MacKenzie is your Primary Account Manager and Point of Contact. Tabitha will respond to JPG requests and ensure all aspects of JPG's business are executed as required, engaging others in the TASC organization, as needed. Tabitha will proactively share important information impacting your benefits accounts. To ensure the highest levels of service, Tabitha is supported by a team of four peers, collectively known as "Team Teal." All team members are kept informed of JPG's needs and cross-trained on its unique requirements.

JPG will have Tabitha Odom as the designated Account Manager who will have direct daily account responsibility for the employee benefits program that JPG is seeking. Tabitha will also be backed by her team which is comprised of Shari, Supporting Account Manager: 23 years, Jodi, Supporting Account Manager: 10 years, Melissa, Supporting Account Manager: 11 years.

She or a member of the Account Management team will return calls to JPG. Tabitha has complete authority to make decisions concerning the management of our contractual responsibilities and is responsible for ensuring the high level of client and customer satisfaction for which TASC is known. In the extremely rare event that no member of the team was available, the call could be escalated to Supervisor of Account Managers, *Kim Fancher*.

Tabitha is responsible for overall interface with JPG with an ultimate goal of complete client satisfaction. Her supporting Account Managers oversee all enrollment activities and to train and interface with the Customer Service staff. They act in support of the team, following deliverables and tracking client and customer issues requiring follow-up and other special projects. The team works together, making sure that JPG has access to a team member at all times. JPG contacts typically communicate via e-mail with the entire group, thus when the Tabitha is not available due to meetings or travel, other members of TEAM JPG can act quickly to resolve customer or client issues as they arise.

The Account Management Team is accessible during business hours via e-mail and toll-free telephone contact. They can also be reached after hours as well via her business cell phone, which also affords e-mail access.

At TASC, the Account Manager has the authority to answer any questions and to take immediate action to address any issues related to the account. The goal, always, is a delighted Client.

TASC's Account Managers are dedicated, experienced professionals, trained in all of TASC's service offerings and able to work with different departments within TASC to successfully support your benefit programs. Account Managers manage the administration of our largest Clients, including:

- Works closely with other Account Managers on her team to ensure Client satisfaction

- Ensures proper routing for all processing
- Follows-up on issues to ensure completion and “closes the loop”
- Maintains documentation and communication of issues
- Owns the renewal process to ensure success
- Escalates issues, recommends resolution, and is on top of continuous improvement efforts
- Reviews your account on a regular basis to ensure we are meeting your needs and expectations

TASC’s Account Managers are invested in the success of their Clients’ programs. Account Managers also work closely with our Compliance and Quality Services departments, which allows them to be on the cusp of solutions to issues as well as informed on compliance situations, which may affect our Clients.

Each Account Manager works as part of an Account Management Team. MHS will be served by TASC’s Team Teal, which consists of the other identified Account Management Team staff.

All team members are cross-trained on assigned Clients and provide back-up should your assigned Account Manager be unavailable. Each Account Management Team is led by an Account Management Supervisor that has a strong background in benefits and strong management experience. The Account Management Supervisor will also serve as a point of escalation for you.

8. How many members are being served by your company nationally and in Louisiana?How many employers with 3,000+ employees are being served in Louisiana by you?

TASC has approximately 1 million participants being served with over 7,307 within the Louisiana.

9. Provide three references which have similar dynamics to Jefferson Parish Government.At least one reference group should have gone through the respective enrollment process within the last two years. Include contact names, phone numbers and email addresses.

Current Clients (Public Groups)	Group Size (EEs)	Product(s) FSA, COBRA	Contact Name	Contact Title	Contact Telephone
Alvin Independent School District, TX	3,600	FSA	Donnie Marek	Senior Director Risk Management	281-245-2488
City of Carrollton, TX	1,022	FSA, HRA, COBRA and Retiree Billing	Jessica O’Leary	Benefits Administrator	316-695-7214
Wichita Falls Independent School District, TX	1923	FSA, COBRA and FMLA	Lisa Bean	Benefits Administrator	940-235-1014

10. **Please provide the most recent results from the following surveys for:**

- **Member Satisfaction**

  TASC has a 90% First Call Resolution rate/

  After years of conducting quarterly satisfaction surveys with participants, TASC relies on more direct and function-specific methods to review call quality, improve service, and reward excellence. Every call is recorded and every Web portal and TASC Mobile App comment is documented. Senior staff are charged with reviewing, evaluating, and training based on those customer inputs.

- **Provider Satisfaction**

  TASC is loved and revered by the Provider Community for the excellent carve-out Provider Services we offer to our value partners. Therefore, it should come as no surprise that our Provider Satisfaction has consistently been rate either Good, Very Good or Excellent.

11. **What are your weekday and weekend hours of telephone member services availability?**

Monday-Friday (excluding holidays), 7AM-7PM, CST.

12. **What is your company's website address and what member information may be accessed from the site?**

https://www.tasconline.com/ubaaccess Following are two links for guided tours/demo of our website tools.

Participant Demo: https://youtu.be/J13if6K38R8

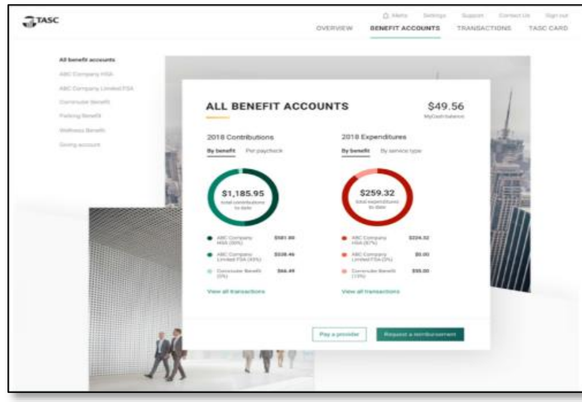
Client Demo: https://youtu.be/T-BMb1a15DA

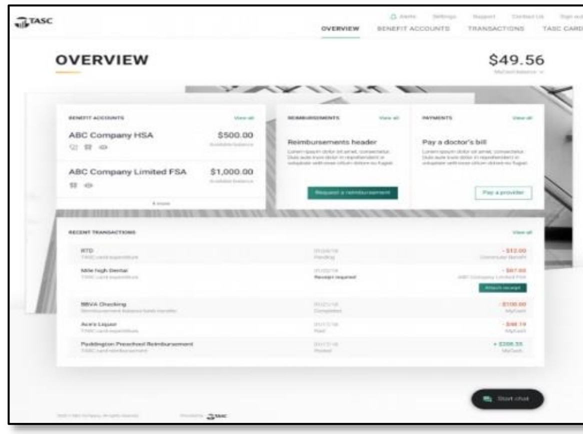
For further functionality of what information members may access on the site, please view the following couple of pages.

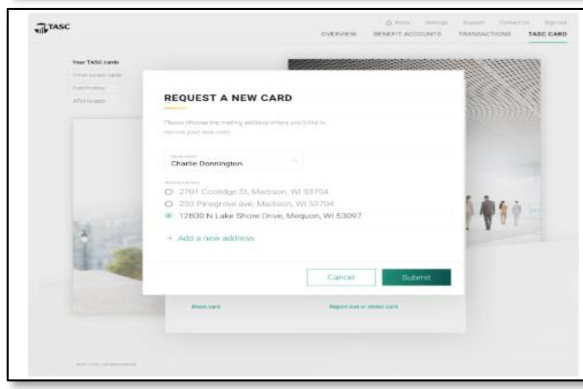
Remainder of this page intentionally left blank.

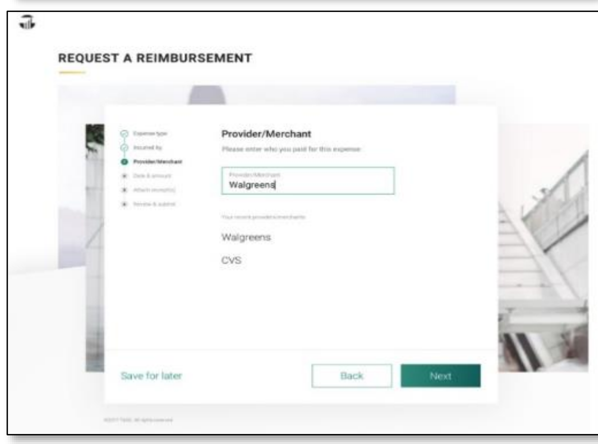
Participant Portal
A TASC's Universal Benefit Account™ online portal is a robust and powerful self-service system which gives participants the freedom to view/manage their account 24/7/365. TASC website functionality includes:

- An expense estimator and new-age tax-savings calculator
- Online portal chat feature where participants can receive support in real-time with CSRs
- TASC MyCash Account which allows participants to use the TASC Card as an unrestricted debit card
- Help icons to make information more easily understandable and memorable
- A detailed list of tax-favored eligible expenses/ look-up an eligible expense
- View secure message center
- Set-up for electronic notifications/reminders (text message and emails preferences)
- Audience-centric educational online videos
- Online claims submission
- Pay the Provider sign-up like automatic bill-pay
- Helpful links to pertinent IRS websites
- Flood-the-Bucket function where members can submit a "shoebox" of claims at one time
- Detailed Frequently Asked Questions (FAQs) section
- Debit card information including a list of compliant IIAS merchants/how and where to use
- An interactive pharmacy locator map
- Enroll in program and create account profile
- Securely view account information such as transaction details, transaction history, Plan details, and important dates
- View and download easy-to-complete claims forms and general information
- Ability to request a reimbursement and submit substantiation
- Manage MyCash reimbursements and direct deposit preferences
- View account alerts and messages
- Functionality to Block and unblock Debit Card
- And more!



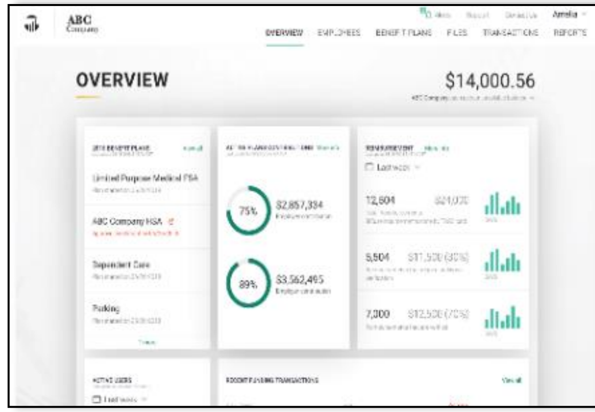






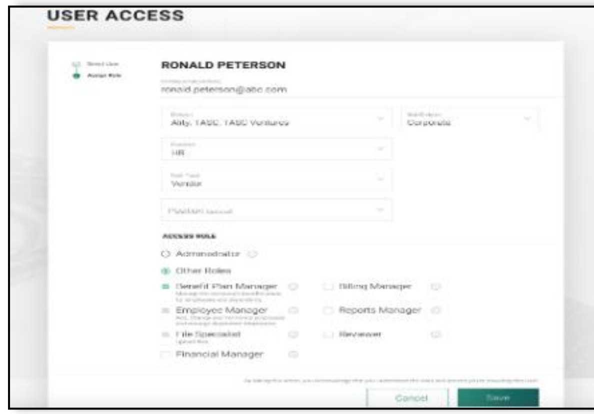
Employer Portal

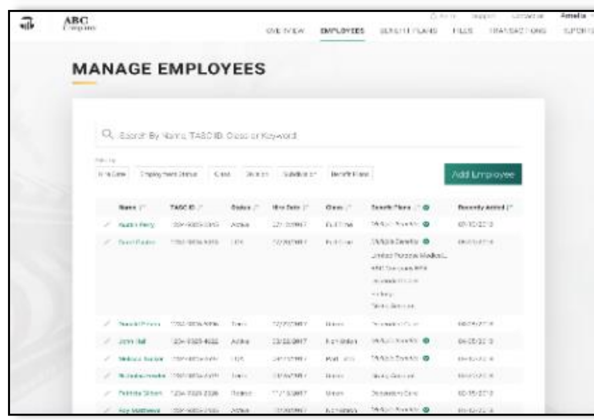
TASC offers the future in online Employer Portals with a robust, first-to-market system for client's staff with 24/7 access to view all things Plan-related at the aggregate level, sub class level, and individual participant level including account statements, balances, exposures and claim history. Through our online Universal Benefit Account™ clients can: Manage enrollment, Check payment history, View Plan activity, Access service level reports, View and modify participant information, Manage payroll verification data and Monitor the status of *member* requests



In addition to the online participant tools listed a few pages back, client will be set-up with its own TASC Employer Portal where clients can determine the staff members who have access to the Employer Portal. Each staff member is provided with a username and unique password. Once the staff member signs in to the Employer Portal, he or she has a number of options, including:

- Access to secure email with TASC
- The ability to run reports on-demand at the employer's convenience
- Access to regularly scheduled management reports at the frequency determined by the employer
- Easy access to view specific member account information, including:
  - payroll contribution dates
  - payroll contribution amounts
  - claim payments
  - plan year election amounts
  - current balance
- The ability to upload files to TASC
- The ability to download files from TASC



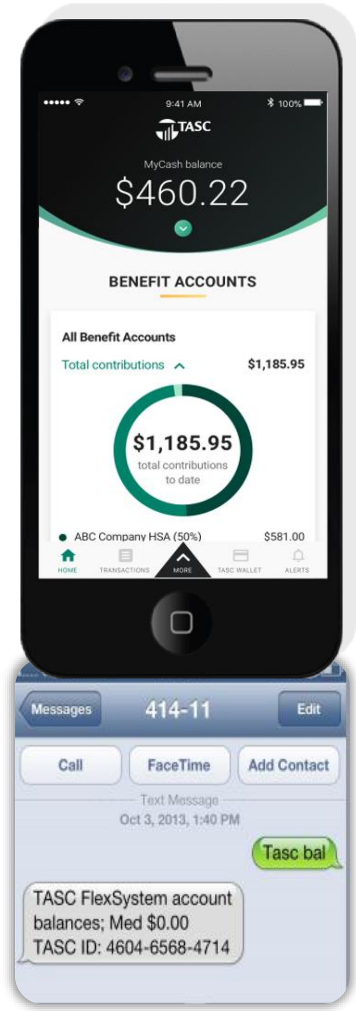


For clients, we provide access to Plan activity and service-level reporting for client' TASC accounts.

- **Plan Management** – Shows the previous and current Plan Year details of the benefits offered and provides a Summary Plan Description (SPD) for each Plan Year.
- **Payroll Verification Report (PVR)** – Details each enrollee and their election amount(s) for each scheduled payroll date.
- **Participant List** – Details each participant in the Plan and their account status. Also allows the client to access each participant individual account.
- **Balances and Exposures** – Current participant Account balances compared to Contributions received to date and claims paid to date.
- **Plan Contribution Payments** – List of all PVR payments received for each scheduled payroll date.
- **Plan Finalization** – Final report of participant Accounts for the current and previous Plan Years.

Mobile App

Mobile app technology is a standard that participants expect for fast and convenient service. TASC offers a cutting-edge mobile app that is leaps-and-bounds ahead-of-the-curve of what is currently in the market. TASC mobile capabilities provide real time access to securely check balances, view transaction details, access plan information, request a reimbursement, and submit substantiation.



TASC Mobile App features include:

- **Customer Service Chat** to engage live Call Center Agents
- **Text Message (SMS) alerts and notifications** for instant interactive communications
- Self-setup of an innovative method of reimbursement faster than direct deposit with our first-to-market ***MyCash*** solution that provides cash in a matter of hours as opposed to days in participants'' pockets.
- **Card Decline Protection** to prevent Cards from ever declining at the point-of-sale (a compliance-driven option for employees and SBBC).
- **ATM finder** to quickly locate an ATM to pull cash out of from the ***MyCash*** purse on our Card.
- Mobile app **bio-metric screening** (Face ID and Thumb Print ID) for additional levels of security.
- **Lock Card** self-service in case a participant loses a card and/or finds it later.
- **Pay-My-Provider** works like automatic bill-pay.
- **Receipt Repository** works just like an expense report engine to capture substantiation and allows participants to submit a "flood-the-bucket" claim.
- **Picture-to-pay** allowing participants to simply take a picture of a bill and submit for payment.
- **Eligible Expenses Look-up** provides participants instant access to look-up an item to see if it's eligible for reimbursement (item name, brand or bar code).
- Real-time account balances, for both active and closing plans.
- Submit requests for reimbursement directly from mobile device.
- Help screen for troubleshooting.
- Secure account access through Secure Socket Layer (SSL) encryption over the Internet.
- View TASC Card MyCash balance and transaction history, including deposits, transfers, and purchases
- View Plan information, plan eligibility dates, reimbursement and contribution totals, and annual election amounts
- Ability to view historic claim details, such as service date, provider, and payment amount

13. Do you agree to comply with all of the proposal assumptions and requirements as outlined in this SOQ? If not, specifically explain how your proposal deviates from this.

Yes.

14. Do you agree to administer the requested benefits plan as described? If not, specificallyidentify any variations in plan designs.

Yes.

15. Will you be able to administer all services, including processing of claims on the effectivedate of the contract? If not, please explain.

Yes.