

**JEFFERSON PARISH GOVERNMENT**

**STATEMENTS OF QUALIFICATION 2022-031**

**FOR**

**ACTUARIAL AND CONSULTING SERVICES**

**AUTHORIZED BY RESOLUTION NO. 139779**

**JULY 7, 2022**

**PRESENTED BY**



[www.sigmacorp.net](http://www.sigmacorp.net)



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July 7, 2022

Jefferson Parish Government  
Ms. Maria Leon, Director  
Department of Risk Management  
1221 Elmwood Park Boulevard  
Suite 315  
Jefferson, Louisiana 70123

Dear Ms. Leon:

Sigma Consulting Corp. and Sigma Actuarial Consulting Group, LLC (Hereinafter collectively referred to as SIGMA) appreciates the opportunity to present its Actuarial and Consulting SOQ 2022-031 Proposal Response to Jefferson Parish Government authorized by Resolution 139779. SIGMA is excited by the opportunity to continue to assist the Parish in meeting financial reporting and management support needs related to the Parish's self-insured program.

SIGMA is an independent actuarial, employee benefits, insurance and risk management consulting firm which is headquartered in Metairie, Louisiana and other offices in Nashville, Tennessee; Dallas, TX; Houston, TX; and Destin, FL. Our local staff consists of consulting actuaries, actuarial analysts, certified public accountants, risk consultants, risk analysts, employee benefits consultants, and financial management consultants. Our staff provides consulting services to governmental and not-for-profit entities, private industry, and associations.

Our services are provided on a fee only basis. This allows Sigma to offer independent counsel to our clients. *Sigma does not sell any financial or insurance products.* We feel that product sales based on the receipt of commissions may adversely affect the independent status of advice provided to Jefferson Parish.

SIGMA is the only firm in Louisiana that is a member of the Society of Risk Management Consultants, the only independent consultants' professional organization. As independent advisors and consultants, we provide creative and cost effective business solutions for our clients from an unbiased perspective in the areas of:

- Risk Management
- Actuarial Analysis
- Building Valuations
- Employee Benefits
- Retirement Planning
- Forensic Accounting



SRMC

...Your Assurance of Objectivity, Independence and Integrity.

Firm is a Member of the Society of Risk Management Consultants.

Ms. Maria Leon

Page 2

July 7, 2022

- Loss & Claims Consulting
- Litigation Management
- FEMA Recovery
- Insurance
- Risk Financing
- Property Loss Recovery

Our professional consulting staff consists of associates who specialize in providing services to public entities. If Sigma is selected to serve Jefferson Parish, your account will be serviced out of our Metairie, Louisiana office.

Jefferson Parish has been and will continue to be a most valued client, and we are confident in our ability to provide cost-effective actuarial and consulting services accompanied by an unsurpassed level of responsiveness. We are committed to contracting for and performing our services in a timely manner as agreed upon between Jefferson Parish and SIGMA.

We look forward to the opportunity to continue to support Jefferson Parish as its Actuary and Consultant for self-insured liabilities. Please do not hesitate to contact me at [tthomas@sigmacorp.net](mailto:tthomas@sigmacorp.net) or 504-258-2587 if you have any questions or wish to further discuss our proposal.

Sincerely,



C. Todd Thomas  
Chief Consultant



## Table of Contents

SECTION 1 –FIRM QUALIFICATIONS AND EXPERIENCE .....	1
SECTION 2 –GENERAL SERVICES QUESTIONNAIRE AND SOQ AFFIDAVIT.....	5
SECTION 3 –NO CONFLICT OF INTEREST (SOQ SECTION 1.40).....	5
SECTION 4 – ATTACHMENTS .....	6

### Attachment A Resumes of Service Team Members

### Attachment B Sigma Financial Statements

Sigma Consulting Corp. is a fiscally conservative corporation with the resources and lines of credit necessary to fulfill our obligations under this engagement. An extract of Sigma Consulting's financial report is included as an attachment. Please note that Sigma Consulting Corp. is a privately held corporation and that this information is **proprietary** and **confidential**.

### Attachment C Additional Services Available

### Attachment D Corporate Resolution, Affidavits and Professional Services Questionnaire

### Attachment E Sigma Specimen Certificates of Insurance



SECTION 1 –FIRM QUALIFICATIONS AND EXPERIENCE

- 1) *The selected consultant will be a firm of national reputation with at least two employees who are members of the American Academy of Actuaries.*

SIGMA has been engaged by entities from across the country to manage a variety of risk management services.

At least two of SIGMA's consulting actuaries are members of the American Academy of Actuaries. Al Rhodes, Michelle Bradley and Tommy Axford are all Members of the American Academy of Actuaries. They not only meet the membership requirement but also decades of collective experience with clients across the nation. Additionally, our actuaries are members and/or associates of the Casualty Actuarial Society, Society of Actuaries, Institute and Faculty of Actuaries, and Caribbean Actuarial Association.

- 2) *They will include identification of personnel to be involved in the project, including their professional qualifications and experience. The proposal shall include a description of the firm's local presence, including local offices, personnel, clients, etc. and the firm's most recent Financial Statement.*

Sigma's service team is available for frequent communication with the Parish. We will provide timely and meaningful responses to issues and inquiries. Sigma will ensure that Jefferson Parish representatives have cell numbers for key team members. The Engagement Manager for work under this SOQ will be C. Todd Thomas.

Please see **Attachment A** for professional biographies of the Service Team for Parish of Jefferson, State of Louisiana. Personnel will be assigned to the elements of the project based on experience, expertise, and project demands.

SIGMA is domiciled in and has its headquarter office in Jefferson Parish, Louisiana. SIGMA is attuned to Jefferson Parish's unique character. We also service clients in Orleans, Plaquemines, Terrebonne, and St. Bernard parishes. Our local clients are listed in response number 3 below.

Sigma Consulting Corp. is a fiscally conservative corporation with the resources and lines of credit necessary to fulfill our obligations under this engagement. A copy of Sigma Consulting's latest financial statement is included as **Attachment B**. Please note that Sigma Consulting Corp. is a privately held corporation and that this information is **proprietary and confidential**.



- 3) *A list of five to eight clients for whom similar projects have been performed. Please indicate when the personnel involved in the Parish of Jefferson's evaluation have had a major role in providing these professional services.*

SIMILAR SERVICE PROVIDED TO LOCAL CLIENTS

1. Jefferson Parish, Louisiana
2. City of Kenner, Louisiana
3. City of New Orleans, Louisiana
4. East Jefferson General Hospital (Jefferson Parish Hospital Service District No. 2)
5. LCMC Health System
6. Plaquemines Parish Government, Louisiana
7. Terrebonne Parish Consolidated Government, Louisiana
8. West Jefferson Medical Center (Jefferson Parish Hospital Service District No.1)

OTHER PUBLIC ENTITY ACTUARIAL CLIENTS

1. Ascension Parish, Louisiana
2. DeKalb County, Georgia
3. Escambia County School District, Florida

The personnel identified for servicing Jefferson Parish are qualified and have had a major role in providing the same or similar professional services for the above-mentioned clients.

- 4) *A re-statement of the scope of work to be performed, including your understanding of the tests required by the parish and any additional related capabilities of your firm.*

**Scope of Work**

The selected actuarial consultant would be required to provide the parish with his/her proposed actuarial and risk financing advice on the matters listed below:

- A. The parish's total liability as of December 31 each year for all self-insured losses incurred but not paid.
- B. The amount of funding required to pay self-insured claims cost that are projected to come due by December 31 each year.
- C. The amount of funding required to pay self-insured claims cost (for all years) that are projected to be incurred for the fiscal year January 1, through December 31.
- D. The self-insured losses incurred for each fiscal year beginning January 1, 1989.
- E. The potential for actual losses to vary from the actuarial estimates.
- F. The adequacy of current funding levels and the amount of funds escrowed to pay current claims.



- G. The efficiency and effectiveness of the parish's current system and procedures in claims reporting, data collection and data management.
- H. The amounts and methods of recognizing general liability (including public official errors and omissions) automobile liability and workers' compensation liabilities in conformance with Governmental Accounting Standards Board (GASB) rule 10.
- I. An evaluation of the parish's overall management of current risk financing techniques and recommendations for improvement.
- J. An evaluation of insurance policies upon request.
- K. Conducting insurance marketplace investigations upon request.
- L. Updating and verifying building and contents replacement cost values for insurance purposes.
- M. Any other matters which may be pertinent to Jefferson Parish's self-insured and fully insured programs including cost and efficiency of litigation processes.

Sigma understands that Jefferson Parish has the right to audit and verify Sigma's work product and other services performed. Sigma also fully understands the scope of the work including, but not limited to, the tests which are required by Jefferson Parish.

See **Attachment C** for Additional Services that Sigma can provide.

**5) *Explain how your work will lay foundation for actuarial audits in the future, whether by your firm or another.***

If Sigma is selected to continue to provide actuarial services to Jefferson Parish, its work product can be used by Sigma or any other actuarial consulting firm as a foundation for future actuarial reserve analysis and forecasting. More specifically, Sigma's work product offers all of its calculations including but not limited to loss triangles, loss development factors, risk margin and aggregate loss probability.

Not only will Jefferson Parish and its future actuaries be able to use Sigma's work product as a foundation for future reporting but it also be able to use the work product for the following:

- Actuarial reserve certification;
- Satisfaction of self-insurance requirements; and
- Negotiation of collateral requirements.

**6) *Give an indication of the materials that will be needed by the actuary, include any informational requirements for the parish that are necessary to complete the study.***

**Sample Data Requirements**

**Loss Information**

To conduct the actuarial analysis, Sigma will need both loss summary information and



detailed information. All claims data should be unlimited (amounts should not be reduced by deductibles / retentions or excess insurance).

Summary loss data includes the number of occurrences closed, the number of occurrences reported, paid losses and reported losses for each loss period at annual 12-month evaluations. If available, please separate the number of occurrences closed into those closed with and without payment. The summary should be segregated by line of coverage.

The detailed information should include claim number, accident date, report date, closure date, paid losses (medical, indemnity and ALAE) to date, incurred losses (medical, indemnity and ALAE) to date and a brief description of the incident. This information is needed only at the latest evaluation of the summary data and should be sorted by accident date.

Please provide loss information for policy periods beginning 1/1/1992 through 12/31/[YEAR], **valued as of 12/31/[Year]**.

- Automobile Liability
- General Liability
- Public Officials Liability
- Workers' Compensation

#### **Exposure Information**

Exposure information includes audited exposures for each loss period and an estimate for the projected period. Although Sigma has historical exposure information in-house, we are still in need of the following:

- Vehicle Count – Actual [YEAR] and Projected [YEAR]
- Total Number of Employees – Actual [YEAR] and Projected [YEAR]
- Total Payroll – Actual [YEAR] and Projected [YEAR]
- Financial Statement - FYE 12/31/[YEAR] and Projected [YEAR]

#### **Loss Limitation Information**

Information on per occurrence and aggregate retentions and limits should be provided for each historical loss period and an estimate for the projected period.

Please provide per occurrence and aggregate retentions and limits for policy period 1/1/[YEAR] for automobile liability, general liability, public officials and workers' compensation.





SECTION 2 –GENERAL SERVICES QUESTIONNAIRE AND SOQ AFFIDAVIT

Affidavits and Professional Services Questionnaire for SIGMA and its subcontractors are contained in **Attachment D**. Please see specimen Certificates of Insurance in **Attachment E**.

SECTION 3 –NO CONFLICT OF INTEREST

**The Proposer shall not hire any officer or employee of the Parish of Jefferson to perform any service covered by this Agreement.**

Agreed.

**The Proposer affirms that to the best of his/her knowledge there exists no actual or potential conflict between the Proposer's family, business, or financial interests and the services provided under this Agreement, and in the event of change in either private interests or service under this Agreement, any question regarding possible conflict of interest which may rise as a result of such change will be raised with the Parish of Jefferson.**

SIGMA affirms no conflict of interest.



SECTION 5 – ATTACHMENTS

**Attachment A Resumes of Service Team Members**

**Attachment B Sigma Financial Statements**

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**Attachment C Additional Services Available**

**Attachment D Corporate Resolution, Affidavits and Professional Services Questionnaire**

**Attachment E Sigma Specimen Certificates of Insurance**



## **ATTACHMENT A**

### **RESUMES OF SERVICE TEAM MEMBERS**

**C. Todd Thomas, LL.M, RF, CPCU, ARM-P, Ch.FE, AIC, CRA**

Todd Thomas has worked in the risk management consulting industry for over 30 years. Todd regularly serves as an expert witness and occasionally as Special Master to courts in the area of risk. Todd is also a licensed consultant, licensed adjuster, and licensed risk manager.

Interestingly, Todd has also served as Chief Risk Officer for several of SIGMA's clients.

Todd's experience assisting public entities, non-profits, and other organizations with risk management and insurance includes but is not limited to actuarial analysis, insurance claims, coordinating FEMA Public Assistance grants and property insurance claims, insurance marketing, total cost of risk, risk identification, risk allocation, underwriting, claims, financial risk management, FEMA obtain & maintain compliance, risk analysis, risk management information systems and enterprise risk management.

Todd has served as the President and on the Board of Directors of the Society of Risk Management Consultants. Todd is also a Fellow of the Global Academy of Financial Management, Member of the Association of Certified Chartered Economists, a Fellow of the Risk and Insurance Management Society, Member of the Global Risk and Insurance Management Institute, and Member & Associate of the Caribbean Actuarial Association.

Todd's unique specialization helps state and local governments, as well as private organizations, manage risk by advising clients and using methods and tools to manage and mitigate its exposures to risk.

Todd received his B.S. in Economics, Master of Business Administration (MBA), Master of Laws (LL.M.) degrees and Doctor of Judicial Science, Fellow.

**Al J. Rhodes, ACAS, MAAA**

Al has spent over 30 years in the actuarial profession and is President & Senior Actuary of SIGMA Actuarial Consulting Group, Inc. located in Nashville, TN. Professional designations include Associate of the Casualty Actuarial Society and Member of the American Academy of Actuaries. Al graduated cum laude and with Honors (B.S. Genetics) from the University of Georgia.

Al founded SIGMA to provide casualty actuarial consulting services to risk managers, brokers, risk management consultants, TPAs and CPAs. The consulting services include all analyses necessary to insure proper financial reporting and program funding. His background includes experience in the process of developing both traditional and alternative insurance programs for entities of all sizes and types.

Al has been actively involved with numerous professional activities over the years and is a Past President of the Casualty Actuaries of the Southeast. He has also made presentations at RIMS, the



Business Insurance Workers Compensation Conference, National Underwriter's Consultative Brokerage Summit and at the annual meeting of the Society of Risk Management Consultants.

AI has published information on the following topics.

- Benchmarking Improved Loss Experience Due To A Loss Control Program
- A Checklist On Negotiating Security Requirements
- An Actuarial Checklist For The Insurance and Risk Management Professional
- Components Of A Loss Analysis
- The Effect of FAS 112 and GASB 10 on Workers Compensation
- The Insurance Professional's Loss Development Primer
- Meeting The Requirements of GASB 10

**L. Michelle Bradley, ACAS, MAAA, ARM, CERA**

Michelle is an Associate in the Casualty Actuarial Society and is a Member of the American Academy of Actuaries. She also obtained the Associate in Risk Management designation in 1996 and received the award for academic excellence in that program. She served as president for the Casualty Actuaries of the Southeast for the 1999-2000 year. From 1990 to September 2003, she was Vice President and Consulting Actuary for Willis Risk Solutions of Willis North America. During this time she consulted extensively in the areas of actuarial, risk management and enterprise risk management. Michelle received the CERA (Chartered Enterprise Risk Analyst) designation in 2013. She has served on the board of directors for the Society of Risk Management Consultants, the Casualty Actuaries of the Southeast, and the Hawaii Captive Insurance Council (HCIC). She also serves on the Advisory Council for Middle Tennessee State University's Master of Science in Professional Science Program (MSPS).

In the area of enterprise risk management, she has focused on modeling issues as regards integrated programs that often include non-traditional risks. She has significant expertise in risk mapping and alternative risk transfer mechanisms. She has been a member of numerous project teams that provided enterprise risk consultancy services and was part of the project team that completed the integrated program that was hailed the "Deal of the Decade" by CFO Magazine (June 2000).

Michelle has spoken at numerous treasury and risk management conferences. She has contributed to academic case studies completed by Harvard and the University of South Carolina in the area of enterprise risk management. As an example, Michelle has published the following papers with external publishers:

- "Enterprise Risk Management: A Consultative Perspective", Insurance in the Next Century Discussion Paper Program, May 2000, by L. Michelle Bradley and Edgar Davenport, Casualty Actuarial Society.



- “Analysis of Catastrophic Risks”, Risk Financing, Section II.G.1, 2005 (updated 2006), by L. Michelle Bradley, International Risk Management Institute.
- “Current Collateral Trends” Risk Financing Perspectives, June 2011, by L. Michelle Bradley, International Risk Management Institute.

Michelle has also completed actuarial, risk management and special consulting projects for numerous clients in varying industries, including significant experience with public entities and state governments. These include allocation analyses, retention analyses, and risk management organizational audits. Additionally, Michelle has been involved in “letter of credit” negotiations and commutation analyses and has served as an expert witness.

Prior to joining Willis, Michelle attended Vanderbilt University, where she taught mathematics courses while pursuing a Master’s Degree. In 1990 Michelle was awarded the outstanding Graduate Student teaching award for the College of Arts and Sciences and received the M.S. Degree in Mathematics. Michelle graduated summa cum laude as valedictorian from Lipscomb University in 1988, receiving a B.S. Degree in Mathematics.

#### **C. Thomas Axford, FSA, MAAA**

Tommy serves as a Consulting Actuary for a broad range of clients.

Tommy has spent the last 18 years working as a consulting actuary managing client relationships, project teams. He has spent the majority of his career focusing on risk analytics – helping clients develop appropriate short-term and long-term risk strategies to meet their objectives. He also has spent an extensive amount of time working with clients more broadly enterprise risk projects. Tommy has had significant focus on helping clients understand financial implications of the strategic risk decision making process. This includes helping organizations evaluate their risk strategy and develop a long-term approach that allows them to remain efficient while operating within the constraints of the regulations that may impact them. He also works closely with many of our governmental clients helping them identify their exposure to risk and mitigating that risk exposure.

Tommy is a Member of the American Academy of Actuaries and Fellow of the Society of Actuaries.

#### **Helena D Shaw, CPCU, CRM**

Helena has worked in the insurance field for over 25 years. Her insurance background is diverse, with extensive experience in large international accounts. Formerly an Assistant Vice President with Aon Risk Services in Houston, she managed the marketing of domestic and international policies, and serviced the insurance portfolios, including captive insurance programs and large deductible programs for complex international clients.

Helena has worked with clients such as Halliburton Company, Kellogg Brown & Root, Petroleum Helicopters, Inc., Conoco Phillips and AES – an international utility company.



Currently, Helena is a senior consultant at Sigma and provides risk management consulting and support to public entities and public hospitals. Helena specializes in contract analysis and preparation of insurance requirements for a wide range of contracts and agreements for public entities. Her responsibilities include contractor insurance review, property and casualty insurance consulting for public entities and hospitals, as well as preparation and maintenance of all Sigma client Schedules of Insurance.

Helena holds the Chartered Property Casualty Underwriter (CPCU) and the Associate in Risk Management (ARM) professional designations. Additionally, Helena is licensed as an insurance consultant for property and casualty lines of authority in the State of Louisiana.

### **Noel Orsak**

Noel started her career as a Management Consultant with Price Waterhouse. After working in the Mergers and Acquisitions and Oil and Gas Systems Development groups at Price Waterhouse, she started worked as an actuarial analyst with Marsh & McLennan, Inc. During her time at Marsh, she helped create a specialized consulting practice focused on Risk Management best practices, process improvement and information management. After rising to the position of Senior Vice President at Marsh, she started her own independent consulting firm, NOSH Consulting in 2003. Noel joined forces with us in 2009. Noel has provided risk management consulting services to public entities like those requested by the Jefferson Parish since 2009.

Additionally, Noel is a member and director of the Society of Risk Management Consultants and a member of the Risk & Insurance Management Society. She received a B.A. in Economics, Math and French and has pursued Executive Continuing Education at Rice University.

Noel has worked with numerous public entity clients on Risk Management (RM) function assessments, insurance program review and audit, actuarial loss analysis, RMIS system needs and vendor selection, and other vendor review projects. Noel has expertise in Actuarial Loss Analysis, Risk Management Function Assessments, Review / Audit, and Risk Control.

Additional client industry expertise includes: Governmental and Public Entities, Oil and Gas / Energy Industry, Transportation Industry, Rail Transportation Industry, Medical & Hospital Industry, and Grocery, Food & Hospitality Industries

### **Tony King**

Tony has spent over 25 years in a variety of risk management roles, having joined SIGMA in 2004 as an Actuarial Consultant. Beyond providing actuarial consulting services with SIGMA, Tony has experience in managing credit risk, residual risk, and interest rate risk.

Tony's consulting services with SIGMA include a specialization in data management and analysis. He manages the preparation of actuarial reserve analyses and loss projections for clients across a range of industries. His primary focus lies in workers compensation, automobile liability, general



liability, and products liability insurance coverages. In addition, Tony also serves as an advisor for small risk-bearing entities, utilizing his expertise in financial forecasting and risk analysis.

Tony graduated summa cum laude from Indiana University's Kelley School of Business - Indianapolis in 1993, receiving a B.S. Degree in Business with Honors in Finance and minors in Economics and Mathematics.

### **Lori E. Ussery**

Lori has been in the actuarial profession since 2002. She has been a consultant with SIGMA since 2006. She prepares actuarial reserve analyses, loss projections and statistical models for clients across a wide range of industries. She also manages projects, completes peer reviews and provides actuarial and statistical support to SIGMA's Risk Retention Model. She has extensive experience analyzing data for workers compensation, automobile liability, general liability, products liability, medical professional liability, property and many non-traditional insurance coverages.

Lori has passed CAS Exams 1 Probability, 2 Financial Mathematics, 3F Models for Financial Economics, S Statistics and Probabilistic Models and is currently testing. She completed the "Decision-Making and Quantitative Risk Analysis" course offered by Palisade and attends various annual conferences (CICA, SRMC, TCIA, RIMS and VCIA) and webinars. Lori has authored various blogs and educational videos released by SIGMA.

Prior to joining SIGMA, Lori was a consultant at Willis North America, providing actuarial consulting and support primarily to Willis' brokerage accounts. She worked closely with many captive and corporate accounts.

Lori graduated from Lipscomb University in 2001 with a Bachelor of Science degree in Mathematics.

### **Jason Luckett**

Jason joined SIGMA in 2016 as an Actuarial Analyst. His primary areas of expertise are workers compensation, automobile liability, general liability, medical professional liability, and products liability insurance coverages. Jason's consulting services with SIGMA involve the preparation of actuarial reserve analyses and loss projections for self-insurers, large deductible programs, and captives across a range of industries. He also performs statistical simulations to model client losses and to assess the effects of varying levels of risk retention.

In addition to his consulting duties, Jason also works in a variety of other roles for SIGMA's Risk66 suite of services. These roles include Support for the Loss Forecaster software and editing Risk66 content.



Jason graduated summa cum laude from Middle Tennessee State University in 2016 with a Bachelor of Science degree in Mathematics with a specialization in Actuarial Science and a minor in Insurance. He is currently pursuing an Associate designation in the Casualty Actuarial Society.





**ATTACHMENT B**

**CONFIDENTIAL**

**SIGMA FINANCIAL STATEMENTS**

**Sigma Consulting Corp.**

**Profit and Loss**

January - December 2021

	<u>Total</u>
Income	
Consulting Income	<u>1,263,649.51</u>
	\$
Total Income	<u>1,263,649.51</u>
Cost of Goods Sold	
	\$
Total Cost of Goods Sold	<u>1,704.89</u>
	\$
Gross Profit	<u>1,261,944.62</u>
Expenses	
	\$
Total Expenses	<u>1,278,759.03</u>
	-\$
Net Operating Income	<u>16,814.41</u>
Other Income	
	\$
Total Other Income	<u>62,900.00</u>
	\$
Net Other Income	<u>62,900.00</u>
	\$
Net Income	<u>46,085.59</u>

**CONFIDENTIAL**



## **ATTACHMENT C**

### **Additional Services Available**

In addition to scope of services listed above, Sigma can also provide the following services to Jefferson Parish, if needed.

#### **Risk Identification & Analysis**

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>• Exposure identification</li><li>• Funding analysis</li><li>• Loss retention analysis</li></ul> | <ul style="list-style-type: none"><li>• Renewal bids</li><li>• GASB 10 calculations</li><li>• Contract review</li><li>• Building replacement cost valuation</li></ul> |
|--|---|

#### **Risk Financing**

- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>• Cost benefit analysis</li><li>• Actuarial reserve calculations</li><li>• Insurance policy analysis</li><li>• Insurance renewal analysis</li></ul> | <ul style="list-style-type: none"><li>• Loss portfolio transfer analysis</li><li>• Insurance specification development</li></ul> |
|---|--|

#### **Risk Control**

- |   |  |
|---|--|
| <ul style="list-style-type: none"><li>• Claims analysis and auditing</li><li>• Trend analysis</li><li>• Safety Seminars</li></ul> | <ul style="list-style-type: none"><li>• Loss prevention</li><li>• Site surveys</li><li>• Litigation management</li></ul> |
|---|--|

#### **Vendor Selection**

- |   |   |
|---|---|
| <ul style="list-style-type: none"><li>• Vendor negotiations</li><li>• Vendor assessment</li></ul> | <ul style="list-style-type: none"><li>• Vendor selection and management</li><li>• RFPs development and evaluation</li></ul> |
|---|---|

#### **Risk Administration**

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li>• Budget forecasts</li><li>• Ad hoc reporting to management</li><li>• Insurance Certificate management</li><li>• Claims handling process development</li><li>• Forensic Accounting</li></ul> | <ul style="list-style-type: none"><li>• Total cost of risk calculation</li><li>• Benchmarking of premiums, retentions and limits</li><li>• Risk management manual development</li><li>• RMIS evaluation and recommendation</li></ul> |
|--|--|



**ATTACHMENT D**  
**Professional Services Questionnaire and Affidavit**





**SOQ 22-031 - Actuarial and Consulting Services**  
Jefferson Parish Government

Project documents obtained from [www.CentralBidding.com](http://www.CentralBidding.com)

07-Jul-2022 01:22:16 PM



**SOQ No. 22-031**

**Actuarial and Consulting Services**

**Submission Deadline: July 7, 2022 at 3:30 PM**

**ATTENTION VENDORS!!!**

**Please review all pages and respond accordingly, complying with all provisions in the public notice and Jefferson Parish Code of Ordinances Section 2-926 et seq. All submissions must be received on the Purchasing Department's e-Procurement site, [www.jeffparishbids.net](http://www.jeffparishbids.net), by the SOQ submission deadline date and time. Late submissions will not be accepted.**

**Jefferson Parish Purchasing Department  
General Government Building  
200 Derbigny Street, Suite 4400  
Gretna, LA 70053  
Buyer Name: Melissa Ovalle  
Buyer Email: [MOvalle@jeffparish.net](mailto:MOvalle@jeffparish.net)  
Buyer Phone: 504-364-2687**

**PUBLIC NOTICE**  
**SOQ NO. 22-031**

**Actuarial and Consulting Services**

The Parish of Jefferson, authorized by **Resolution No. 139779**, is hereby soliciting the submittal of a Statement of Qualifications (General Professional Services Questionnaire) from qualified firms desiring to provide the Parish with actuarial and consulting services for Jefferson Parish, Jefferson Parish Hospital Service District 1 and Jefferson Parish Hospital Service District 2. (Parishwide)

**DEADLINE FOR SUBMISSIONS: 3:30 p.m., July 7, 2022**

**General**

The Parish of Jefferson has been self-insured for general liability, automobile liability and workers' compensation exposures since January 1, 1989. Prior to retaining these exposures, the parish maintained various primary policies. Since January 1, 1989 until present, the parish maintained various excess insurance policies. The parish has full data on our RMIS system concerning loss developments and triangulation data.

All Services are to be carried out under the direction of the Director of Risk Management, and the Insurance Advisory and Coordination Committee, or their designated representative(s). The Firm shall represent and remain committed to acting in the best interest at all times on behalf of the Parish of Jefferson as its Actuarial Consultant and shall provide The Parish of Jefferson with his/her proposed actuarial and risk financing advice on the matters listed below or those usually implied as a prerequisite for performance of the services whether or not specifically mentioned in this Scope of Services:

- A. The parish's total liability as of December 31 each year for all self-insured losses incurred but not paid.
- B. The amount of funding required to pay self-insured claims cost that are projected to come due by December 31 each year.
- C. The amount of funding required to pay self-insured claims cost (for all years) that are projected to be incurred for the fiscal year January 1, through December 31.
- D. The self-insured losses incurred for each fiscal year beginning January 1, 1989.
- E. The potential for actual losses to vary from the actuarial estimates.
- F. The adequacy of current funding levels and the amount of funds escrowed to pay current claims.
- G. The efficiency and effectiveness of the parish's current system and procedures in claims reporting, data collection and data management.
- H. The amounts and methods of recognizing general liability (including public official errors and omissions) automobile liability and workers' compensation liabilities in conformance with Governmental Accounting Standards Board (GASB) rule 10.
- I. An evaluation of the parish's overall management of current risk financing techniques and recommendations for improvement.
- J. An evaluation of insurance policies upon request.

- K. Conducting insurance marketplace investigations upon request.
- L. Updating and verifying building and contents replacement cost values for insurance purposes
- M. Providing building inspections, order of magnitudes and scoped estimates for insurance purposes.
- N. Any other matters which may be pertinent to Jefferson Parish's self-insured and fully insured programs including cost and efficiency of litigation processes.

#### Minimum Requirements for Selection

- 1. The selected consultant will be a firm with at least two employees who are fellows of the American Academy of Actuaries.
- 2. The proposal shall include identification of personnel to be involved in the project, including their professional qualifications and experience. It shall also include a description of the firm's local (Jefferson and surrounding parishes) presence, including local offices, personnel, clients, etc. and the firm's most recent Financial Statement.
- 3. A list of five to eight clients for whom similar projects have been performed. Please indicate whether the personnel involved in the Parish of Jefferson's evaluation have had a major role in providing these professional services.
- 4. A re-statement of the scope of work to be performed, including your understanding of the tests required by the parish and any additional related capabilities of your firm.
- 5. Explain how your work will lay foundation for actuarial audits in the future, whether by your firm or another.
- 6. Give an indication of the materials that will be needed by the actuary, include any informational requirements for the parish that are necessary to complete the study.

#### Evaluation Criteria

The following criteria shall be used to evaluate each firm submitting a Statement of Qualifications:

- (1) Specific experience- similar or larger scope of services currently being provided (Maximum points awarded shall be 35).
- (2) Personnel- Size of firm considering the number of professional and support personnel, experience of management staff, experience in similar projects, etc. (Maximum points shall be 20).
- (3) Scope of services – (Maximum points shall be 20).
- (4) Location of the principal office where work will be performed. Preference shall be given to persons or firms with a principal business office at which the work will be performed as follows: (1) Jefferson Parish, including municipalities located within Jefferson Parish (15 points); (2) Neighboring Parishes of the Greater New Orleans Metropolitan Region, which includes Orleans, Plaquemines, St.

Bernard, St. Charles, St. Tammany (12 Points); (3) Parishes other than the foregoing (10 Points); (4) Outside the State of Louisiana (6 Points) (Maximum points awarded shall be 15).

- (5) Adversarial legal proceedings between the Parish and the person or firm performing professional services, in which the Parish prevailed or any ongoing adversarial legal proceedings between the Parish and the person or firm performing professional services, excluding those instances or cases where the person or firm was added as an indispensable party, or where the person or firm participated in or assisted the public entity in prosecution of its claim. In the event that the person or firm fails to provide accurate and detailed information regarding legal proceedings with the Parish, including the absence of legal proceedings, the person or firm shall be deemed unresponsive with regard to this category, and zero (0) points shall be awarded (Maximum points awarded shall be 10 for the lack of any such adversarial proceedings as defined).

The submitting individuals or firms must identify all subcontractors who would assist in providing professional services for the project. Each subcontractor shall submit a General Professional Services Questionnaire and all documents and information included in the questionnaire. (Refer to Jefferson Parish Code Ordinance, Section 2-928).

All firms (including sub-consultants) must submit a Statement of Qualifications (General Professional Services Questionnaire) by the deadline. Please obtain the most current General Professional Services Questionnaire, by contacting the Purchasing Department by telephone at (504) 364-2678 or via the Jefferson Parish website at [www.jeffparish.net](http://www.jeffparish.net) by clicking on "Business & Development", and then clicking on "Professional Services Questionnaire".

Submissions will only be accepted electronically via the Parish's e-Procurement system, Central Bidding. Central Bidding can be accessed by visiting either [www.centrauctionhouse.com](http://www.centrauctionhouse.com) or [www.jeffparishbids.net](http://www.jeffparishbids.net). Registration is required and free for Jefferson Parish vendors by accessing the following link: [www.centrauctionhouse.com/registration.php](http://www.centrauctionhouse.com/registration.php).

No SOQ submittals will be accepted after the deadline.

Affidavits are not required to be submitted with the Statement of Qualifications, but shall be submitted prior to contract approval, including any sub-contractors.

Disputes/protests relating to the decisions by the evaluation committee or by the Jefferson Parish Council shall be brought before the 24<sup>th</sup> Judicial District Court.

**ADV: The New Orleans Advocate: June 15, 2022**



## **General Professional Services Questionnaire Instructions**

- The General Professional Services Questionnaire shall be used for all professional services except outside legal services and architecture, engineering, or survey projects.
- **The General Professional Services Questionnaire should be completely filled out. Complete and attach ALL sections. Insert “N/A” or “None” if a section does not apply or if there is no information to provide.**
- Questionnaire must be signed by an authorized representative of the Firm. Failure to sign the questionnaire shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- All subcontractors must be listed in the appropriate section of the Questionnaire. Each subcontractor must provide a complete copy of the General Professional Services Questionnaire, applicable licenses, and any other information required by the advertisement. Failure to provide the subcontractors' complete questionnaire(s), applicable licenses, and any other information required by the advertisement shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- If additional pages are needed, attach them to the questionnaire and include all applicable information that is required by the questionnaire.

## General Professional Services Questionnaire

**A. Project Name and Advertisement Resolution Number:**

Actuarial and Consulting Services  
Authorized by Resolution No. 139779

**B. Firm Name & Address:**

Sigma Consulting Corp.  
3945 N. I-10 Service Rd., West  
Suite 200  
Metairie, LA 70002

**C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:**

C. Todd Thomas, Chief Consultant  
Sigma Consulting Corp.  
tthomas@sigmacorp.net  
504.258.2587

**D. Address of principal office where Project work will be performed:**

3945 N. I-10 Service Rd, West  
Suite 200  
Metairie, LA 70002

**E. Is this submittal by a JOINT-VENTURE? Please check:**

YES \_\_\_\_\_ NO   X  

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

**F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.**

1.

2.

## General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES \_\_\_\_\_ NO \_\_\_\_\_

H. List all subcontractors anticipated for this Project. Please note that all subcontractors must submit a fully completed copy of this questionnaire, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.

Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. Jansen Adjusters International	Claims Consulting	Yes
2.		
3.		
4.		
5.		

## General Professional Services Questionnaire

<b>I. Please specify the total number of support personnel that may assist in the completion of this Project:</b> <div style="text-align: center; margin-top: 10px;"> <span style="border-bottom: 1px solid black; display: inline-block; width: 100px;"></span>                   12       </div>
<b>J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.</b>
<b>PROFESSIONAL NO. 1</b>
<b>Name &amp; Title:</b>
C. Todd Thomas, Chief Consultant
<b>Name of Firm with which associated:</b>
Sigma Consulting Corp. Sigma Actuarial Consulting Group
<b>Description of job responsibilities:</b>
Engagement Manager
<b>Years' experience with this Firm:</b>
22+
<b>Education: Degree(s)/Year/Specialization:</b>
Bachelor of Science in Economics / 1994 Master of Business Administration / 2002 Master of Laws 2006 / 2006 Doctor or Judicial Science, Fellow /2013
<b>Other experience and qualifications relevant to the proposed Project:</b>
<div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"> <ul style="list-style-type: none"> <li>- Fellow of the Charter Certified Economists</li> <li>- Follow of the Global Academy of Financial Management</li> <li>- Fellow of the Risk and Insurance Management Society</li> <li>- Member of the Society of Risk Management Consultants</li> <li>- Member of the National Association of Financial Economists</li> <li>- Chartered Financial Economist (Ch.FE)</li> <li>- Chartered Property and Casualty Underwriter (CPCU)</li> <li>- Associate in Risk Management for Public Entities (ARM-P)</li> <li>- Associate in Claim (AIC)</li> <li>- Certified Risk Analyst (CRA)</li> </ul> </div> <div style="width: 50%;"> <ul style="list-style-type: none"> <li>- Member of the Caribbean Actuarial Association</li> <li>- Member of the International Association of Consulting Actuaries</li> <li>- Accredited Financial Analyst (AFA)</li> <li>- Chartered Organizational Risk Manager (CORM)</li> </ul> </div> </div>

## General Professional Services Questionnaire

<b>PROFESSIONAL NO. 2</b>
<b>Name &amp; Title:</b>
Al Rhodes, Chief Actuary
<b>Name of Firm with which associated:</b>
Sigma Actuarial Consulting Group
<b>Description of job responsibilities:</b>
Casualty Actuarial Analysis
<b>Years' experience with this Firm:</b>
25+ Years
<b>Education: Degree(s)/Year/Specialization:</b>
Bachelor of Science with Honors in Genetics / 1992
<b>Other experience and qualifications relevant to the proposed Project:</b>
Member of the American Academy of Actuaries Associate of the Casualty Actuarial Society Member Society of Risk Management Consultants

## General Professional Services Questionnaire

<b>PROFESSIONAL NO. 3</b>
<b>Name &amp; Title:</b>
Michelle Bradley Senior Actuary
<b>Name of Firm with which associated:</b>
Sigma Actuarial Consulting Group
<b>Description of job responsibilities:</b>
Casualty Actuarial Consulting
<b>Years' experience with this Firm:</b>
25+ years
<b>Education: Degree(s)/Year/Specialization:</b>
Bachelor of Science in Mathematics / 1988
<b>Other experience and qualifications relevant to the proposed Project:</b>
Member of the American Academy of Actuaries (MAAA) Associate of Casualty Actuarial Society (ACAS) Associate in Risk Management (ARM) Chartered Enterprise Risk Analyst (CERA) Member Society of Risk Management Consultants

## General Professional Services Questionnaire

**K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.**

### PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Jefferson Parish Government Actuarial and Consulting Services Jefferson Parish, Louisiana</p> <p>Maria Leon, Director Department of Risk Management mleon@JeffParish.net 504.736.6907</p>	<p>GASB 10 - Casualty Actuarial Services Risk Management Consulting Services</p>
Length of Services Provided:	Cost of Services Provided:
<p>1997 to Present</p>	<p>GASB 10 - \$12,500</p>

### PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>City of Kenner Actuarial and Risk Management Consulting Services Kenner, Louisiana</p> <p>Wendi Folse, Director wfolse@kenner.La.us 504.468.7207</p>	<p>Actuarial Consulting Services Ongoing Risk Management Services</p>
Length of Services Provided:	Cost of Services Provided:
<p>2000 to present</p>	<p>\$54,000</p>

## General Professional Services Questionnaire

<b>PROJECT NO. 3</b>	
<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
Terrebonne Parish Consolidated Government Actuarial and Risk Management Consulting Services  J. Dana Ortego, Director Department of Risk Management jdortego@tpcg.org 985.873.6474	Actuarial Consulting Services Ongoing Risk Management Services
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>
2003 to present	\$17,500

<b>PROJECT NO. 4</b>	
<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
Plaquemines Parish Government Actuarial and Risk Management Consulting Services Belle Chase, Louisiana  Sue Parks, Insurance Specialist 504.934.6385 Sparks@ppgov.net	Actuarial Consulting Services Ongoing Risk Management Services
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>
2006 to Present	\$15,000



## General Professional Services Questionnaire

<b>PROJECT NO. 5</b>	
<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
City of New Orleans Actuarial and Risk Management Consulting  Eldridge Morris, Risk Manager Risk Management Department 504.658.8909 Eldridge.morris@nola.gov	Actuarial Consulting Services
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>
2007 to Present	\$6,000

<b>PROJECT NO. 6</b>	
<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>

## General Professional Services Questionnaire

**L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.**

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1.  None		
2.		
3.		
4.		

**M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.**

Jefferson Parish  
State of Louisiana

**N. To the best of my knowledge, the foregoing is an accurate statement of facts.**

**Signature:**  **Print Name:** C. Todd Thomas

**Title:** Chief Consultant **Date:** 07/03/2022

## General Professional Services Questionnaire

**A. Project Name and Advertisement Resolution Number:**

Actuarial and Consulting Services  
Authorized by Resolution No. 139779

**B. Firm Name & Address:**

Jansen / Adjusters International  
3945 N. I-10 Service Rd., West  
Suite 200  
Metairie, LA 70002

**C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:**

Luis R. Esteves, IV, Principal  
Jansen / Adjusters International  
3945 N. I-10 Service Rd., West  
Metairie, LA 70002  
lesteves@jansenai.com  
214.232.7281

**D. Address of principal office where Project work will be performed:**

3945 N. I-10 Service Rd, West  
Suite 200  
Metairie, LA 70002

**E. Is this submittal by a JOINT-VENTURE? Please check:**

YES \_\_\_\_\_ NO   X  

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

**F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.**

1.

2.

## General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES \_\_\_\_\_ NO \_\_\_\_\_

H. List all subcontractors anticipated for this Project. Please note that all subcontractors must submit a fully completed copy of this questionnaire, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.

Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1.		
2.		
3.		
4.		
5.		

## General Professional Services Questionnaire

<b>I. Please specify the total number of support personnel that may assist in the completion of this Project:</b> <div style="text-align: center; margin-top: 10px;">_____ 4</div>
<b>J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.</b>
<b>PROFESSIONAL NO. 1</b>
<b>Name &amp; Title:</b>
Luis Esteves, IV Principal and Executive General Adjuster
<b>Name of Firm with which associated:</b>
Jansen / Adjuster International
<b>Description of job responsibilities:</b>
Engagement Manager
<b>Years' experience with this Firm:</b>
20+
<b>Education: Degree(s)/Year/Specialization:</b>
Georgia Institute of Technology / Industrial Engineering / 1988-92
<b>Other experience and qualifications relevant to the proposed Project:</b>
<div style="display: flex; justify-content: space-between;"><div><p>Licensed Adjuster</p><ul style="list-style-type: none"><li>- California: #2i18068</li><li>- Colorado: #352147</li><li>- Florida: #W112055</li><li>- Georgia: #2738725</li><li>- Iowa: #14385370</li><li>- Kansas: #14385370</li><li>- Louisiana: #512842</li><li>- Mississippi: #1018084</li></ul></div><div><ul style="list-style-type: none"><li>- Missouri: #8134844</li><li>- New Jersey: #1513479</li><li>- New York: #PA1276336</li><li>- North Carolina: #14385370</li><li>- Oklahoma: #0040128605</li><li>- Puerto Rico: #3000187549</li><li>- South Carolina: #569396</li><li>- Tennessee: #2011646</li><li>- Texas: #1577939</li></ul></div></div>

## General Professional Services Questionnaire

<b>PROFESSIONAL NO. 2</b>
<b>Name &amp; Title:</b>
<b>Name of Firm with which associated:</b>
<b>Description of job responsibilities:</b>
<b>Years' experience with this Firm:</b>
<b>Education: Degree(s)/Year/Specialization:</b>
<b>Other experience and qualifications relevant to the proposed Project:</b>

**General Professional Services Questionnaire**

<b>PROFESSIONAL NO. 3</b>
<b>Name &amp; Title:</b>
<b>Name of Firm with which associated:</b>
<b>Description of job responsibilities:</b>
<b>Years' experience with this Firm:</b>
<b>Education: Degree(s)/Year/Specialization:</b>
<b>Other experience and qualifications relevant to the proposed Project:</b>

## General Professional Services Questionnaire

**K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.**

### PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Jefferson Parish Government Actuarial and Consulting Services Jefferson Parish, Louisiana</p> <p>Maria Leon, Director Department of Risk Management mleon@JeffParish.net 504.736.6907</p>	<p>Insurance Claim Management Consulting Services</p>
Length of Services Provided:	Cost of Services Provided:
<p>2021 to Present</p>	<p>Unknown - Project is ongoing</p>

### PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>City of Kenner Claim Management Consulting Services Kenner, Louisiana</p> <p>Deborah Foshee, CAO dfoshee@kenner.La.us 504.468.7200</p>	<p>Insurance Claim Management Consulting Services</p>
Length of Services Provided:	Cost of Services Provided:
<p>2021 to present</p>	<p>Unknown - Project is ongoing</p>



## General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Puerto Rico of Port Authority Yamilette C, Garcia Ramirez  Director Department of Risk Management jdortego@tpcg.org 985.873.6474	Risk Management and Claim Management Consulting Services
Length of Services Provided:	Cost of Services Provided:
2018 to 2021	

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Dallas Independent School District Risk Management Department Property Insurance Claim Consulting 9400 North Central Expressway, Suite 1510 Dallas, TX 75231  Latoya Robinson latrobinson@Dallasisd.org 972-925-4063	Property insurance claim consulting for various tornadoes and hail storms.
Length of Services Provided:	Cost of Services Provided:
2015 to present	Unknown - Project is still ongoing

**General Professional Services Questionnaire**

<b>PROJECT NO. 5</b>	
<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>

<b>PROJECT NO. 6</b>	
<b>Project Name, Location and Owner's contact information:</b>	<b>Description of Services Provided:</b>
<b>Length of Services Provided:</b>	<b>Cost of Services Provided:</b>

## General Professional Services Questionnaire

**L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.**

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1.  None		
2.		
3.		
4.		

**M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.**

Jefferson Parish  
State of Louisiana

**N. To the best of my knowledge, the foregoing is an accurate statement of facts.**

Signature: Luis R. Esteves, IV Print Name: Luis R. Esteves, IV

Title: Principal & Executive General Adjuster Date: 07/06/2022

## **Statement of Qualifications Affidavit Instructions**

- **Affidavit is supplied as a courtesy to Affiants, but it is the responsibility of the affiant to insure the affidavit they submit to Jefferson Parish complies, in both form and content, with federal, state and parish laws.**
- **Affidavit must be signed by an authorized representative of the entity or the affidavit will not be accepted.**
- **Affidavit must be notarized or the affidavit will not be accepted.**
- **Notary must sign name, print name, and include bar/notary number, or the affidavit will not be accepted.**
- **Affiant MUST select either A or B when required or the affidavit will not be accepted.**
- **Affiants who select choice A must include an attachment or the affidavit will not be accepted.**
- **If both choice A and B are selected, the affidavit will not be accepted.**
- **Affidavit marked N/A will not be accepted.**
- **It is the responsibility of the Affiant to submit a new affidavit if any additional campaign contributions are made after the affidavit is executed but prior to the time the council acts on the matter.**

*Instruction sheet may be omitted when submitting the affidavit*

## Statement of Qualifications

### AFFIDAVIT

STATE OF Texas

PARISH/COUNTY OF Harris

BEFORE ME, the undersigned authority, personally came and appeared: C. Todd Thomas  
\_\_\_\_\_, (Affiant) who after being by me duly sworn, deposed and said that  
he/she is the fully authorized Representative of Sigma Consulting Corp. (Entity),  
the party who submitted a Statement of Qualifications (SOQ) to Actuarial and Consulting Services  
\_\_\_\_\_ (Briefly describe the services the SOQ  
will cover), to the Parish of Jefferson.

Affiant further said:

#### Campaign Contribution Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

**Choice A** \_\_\_\_\_ Attached hereto is a list of all campaign contributions, including the date and amount of each contribution, made to current or former elected officials of the Parish of Jefferson by Entity, Affiant, and/or officers, directors and owners, including employees, owning 25% or more of the Entity during the two-year period immediately preceding the date of this affidavit or the current term of the elected official, whichever is greater. Further, Entity, Affiant, and/or Entity Owners have not made any contributions to or in support of current or former members of the Jefferson Parish Council or the Jefferson Parish President through or in the name of another person or legal entity, either directly or indirectly.

**Choice B** X there are **NO** campaign contributions made which would require disclosure under Choice A of this section.

Affiant further said:

Debt Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

**Choice A** \_\_\_\_\_ Attached hereto is a list of all debts owed by the affiant to any elected or appointed official of the Parish of Jefferson, and any and all debts owed by any elected or appointed official of the Parish to the Affiant.

**Choice B** \_\_\_\_\_ There are **NO** debts which would require disclosure under Choice A of this section.

Affiant further said:

Solicitation of Campaign Contribution Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

**Choice A** \_\_\_\_\_ Attached hereto is a list of all elected officials of the Parish of Jefferson, whether still holding office at the time of the affidavit or not, where the elected official, individually, either by **telephone or by personal contact**, solicited a campaign contribution or other monetary consideration from the Entity, including the Entity's officers, directors and owners, and employees owning twenty-five percent (25%) or more of the Entity, during the two-year period immediately preceding the date the affidavit is signed. Further, to the extent known to the Affiant, the date of any such solicitation is included on the attached list.

**Choice B**   X   there are **NO** solicitations for campaign contributions which would require disclosure under Choice A of this section.

Affiant further said:

Subcontractor Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

**Choice A**   X  

Affiant further said that attached is a listing of all subcontractors, excluding full time employees, who may assist in providing professional services for the aforementioned SOQ.

**Choice B**           

There are **NO** subcontractors which would require disclosure under Choice A of this section.

Affiant further said:

That Affiant has employed no person, corporation, firm, association, or other organization, either directly or indirectly, to secure the public contract under which he received payment, other than persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project or in securing the public contract were in the regular course of their duties for Affiant; and

*[The remainder of this page is intentionally left blank.]*

That no part of the contract price received by Affiant was paid or will be paid to any person, corporation, firm, association, or other organization for soliciting the contract, other than the payment of their normal compensation to persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project were in the regular course of their duties for Affiant.

\_\_\_\_\_  
Signature of Affiant

C. Todd Thomas

\_\_\_\_\_  
Printed Name of Affiant

SWORN AND SUBSCRIBED TO BEFORE ME

ON THE 6th DAY OF July, 2022.

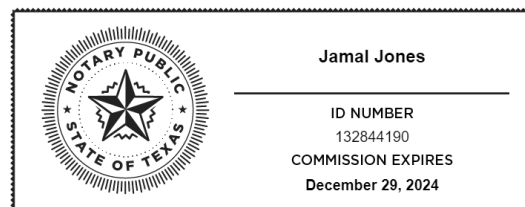
\_\_\_\_\_  
Notary Public

Jamal Jones

\_\_\_\_\_  
Printed Name of Notary

132844190

\_\_\_\_\_  
Notary/Bar Roll Number



Notarized online using audio-video communication

My commission expires 12/29/2024.



Statement of Qualifications

AFFIDAVIT

STATE OF Louisiana

PARISH/COUNTY OF Jefferson

BEFORE ME, the undersigned authority, personally came and appeared: \_\_\_\_\_

Luis Esteves, (Affiant) who after being by me duly sworn, deposed and said that

he/she is the fully authorized Representative of Jansen Adjusters International (Entity),

the party who submitted a Statement of Qualifications (SOQ) to Actuarial and Consulting Services

\_\_\_\_\_  
(Briefly describe the services the SOQ will cover), to the Parish of Jefferson.

Affiant further said:

Campaign Contribution Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

Choice A \_\_\_\_\_

Attached hereto is a list of all campaign contributions, including the date and amount of each contribution, made to current or former elected officials of the Parish of Jefferson by Entity, Affiant, and/or officers, directors and owners, including employees, owning 25% or more of the Entity during the two-year period immediately preceding the date of this affidavit or the current term of the elected official, whichever is greater. Further, Entity, Affiant, and/or Entity Owners have not made any contributions to or in support of current or former members of the Jefferson Parish Council or the Jefferson Parish President through or in the name of another person or legal entity, either directly or indirectly.

Choice B h

there are NO campaign contributions made which would require disclosure under Choice A of this section.

Affiant further said:

Debt Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

Choice A \_\_\_\_\_

Attached hereto is a list of all debts owed by the affiant to any elected or appointed official of the Parish of Jefferson, and any and all debts owed by any elected or appointed official of the Parish to the Affiant.

Choice B h

There are **NO** debts which would require disclosure under Choice A of this section.

Affiant further said:

Solicitation of Campaign Contribution Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

Choice A \_\_\_\_\_

Attached hereto is a list of all elected officials of the Parish of Jefferson, whether still holding office at the time of the affidavit or not, where the elected official, individually, either by **telephone or by personal contact**, solicited a campaign contribution or other monetary consideration from the Entity, including the Entity's officers, directors and owners, and employees owning twenty-five percent (25%) or more of the Entity, during the two-year period immediately preceding the date the affidavit is signed. Further, to the extent known to the Affiant, the date of any such solicitation is included on the attached list.

Choice B h


there are **NO** solicitations for campaign contributions which would require disclosure under Choice A of this section.

Affiant further said:

Subcontractor Disclosures

**(Choose A or B, if option A is indicated please include the required attachment):**

**Choice A** \_\_\_\_\_ Affiant further said that attached is a listing of all subcontractors, excluding full time employees, who may assist in providing professional services for the aforementioned SOQ.

**Choice B**  There are **NO** subcontractors which would require disclosure under Choice A of this section.

Affiant further said:

That Affiant has employed no person, corporation, firm, association, or other organization, either directly or indirectly, to secure the public contract under which he received payment, other than persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project or in securing the public contract were in the regular course of their duties for Affiant; and

*[The remainder of this page is intentionally left blank.]*

That no part of the contract price received by Affiant was paid or will be paid to any person, corporation, firm, association, or other organization for soliciting the contract, other than the payment of their normal compensation to persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project were in the regular course of their duties for Affiant.



Signature of Affiant

Luis R. Esteves

Printed Name of Affiant

SWORN AND SUBSCRIBED TO BEFORE ME

ON THE 6<sup>th</sup> DAY OF July, 2022.

Cs. Ullmann

Notary Public

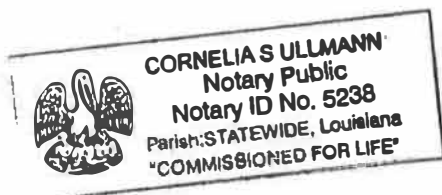
Cornelia S. Ullmann

Printed Name of Notary

5238

Notary/Bar Roll Number

My commission expires with life



**ATTACHMENT E**  
**Sigma Specimen Certificates of Insurance**





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

02/03/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Zodiac Insurance, A World Company 457 Oakshade Road Suite A Shamong NJ 08088	<b>CONTACT NAME:</b> David Wash <b>PHONE (A/C, No, Ext):</b> (856) 396-6500 <b>E-MAIL ADDRESS:</b> dwash@zodiacinsurance.com <b>FAX (A/C, No):</b> <b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Great American Fidelity Insurance Company <b>INSURER B:</b> <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>	<b>NAIC #</b> 0084-41858
<b>INSURED</b> Sigma Risk Management Consulting, LLC 3945 N I-10 Service Road W, Suite 200 Metairie LA 70002		

**COVERAGES****CERTIFICATE NUMBER:** CL201709633**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<b>COMMERCIAL GENERAL LIABILITY</b> <input checked="" type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Errors & Omissions GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			MPLE249015	01/01/2022	01/01/2023	EACH OCCURRENCE \$ 1,000,000
			DAMAGE TO RENTED PREMISES (Ea occurrence) \$ N/A				
			MED EXP (Any one person) \$ N/A				
			PERSONAL & ADV INJURY \$ N/A				
						GENERAL AGGREGATE \$ 2,000,000	
						PRODUCTS - COMP/OP AGG \$ N/A	
						DEDUCTIBLE \$ 25,000	
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$
							BODILY INJURY (Per person) \$
							BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
							\$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$
							AGGREGATE \$
							\$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below		N/A				PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/>
							E.L. EACH ACCIDENT \$
							E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**

Providing risk management consulting services, expert witness services, insurance placement-related services, non-pension actuarial consulting, employee benefits consulting, claims consulting services, FEMA grant consulting, replacement cost valuations for insurance purposes, forensic accounting services related to claims and public adjusting.

**CERTIFICATE HOLDER****CANCELLATION**

For Information Purposes Only

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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AGENCY CUSTOMER ID: 00001954

LOC #: \_\_\_\_\_



# ADDITIONAL REMARKS SCHEDULE

Page \_\_\_\_ of \_\_\_\_

<b>AGENCY</b> Zodiac Insurance, A World Company		<b>NAMED INSURED</b> Sigma Risk Management Consulting, LLC
<b>POLICY NUMBER</b> 		
<b>CARRIER</b> 	<b>NAIC CODE</b> 	<b>EFFECTIVE DATE:</b> 

## ADDITIONAL REMARKS

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,**

**FORM NUMBER:** 25 **FORM TITLE:** Certificate of Liability Insurance

### Additional Insured:

- Noel Orsak, Inc dba Nosh Consulting; retro 1/1/2010
- RISKSOFT, LLC; retro 7/19/2011
- Sigma Actuarial Consulting Group, LLC retro 12/01/2004
- Sigma Employee Benefit Consulting, LLC; retro 8/24/2011
- Sigma Forensic Accounting, LLC; retro 1/1/2011
- Sigma Group, LLC retro 12/01/2004
- Sigma Risk Management Consulting, LLC (Texas) retro 12/01/2004 FKA Sigma Risk Management of Texas
- Sigma Risk Management LLC dba Sigma Forensic Accounting, retro 1/1/2011
- Sigma Consulting Corp; retro 12/1/2004



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
07/07/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b>  Gary D. Hughes 4203 Williams Blvd Ste 200 Kenner, LA 70065	<b>CONTACT NAME:</b> Jamie Estes <b>PHONE (A/C, No, Ext):</b> (504) 468-1980 ext. 207 <b>E-MAIL ADDRESS:</b> jamie.estes.ihb8@statefarm.com <b>FAX (A/C, No):</b> (504) 327-5394																				
	<table border="1"><thead><tr><th colspan="2">INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr></thead><tbody><tr><td>INSURER A :</td><td>State Farm Fire and Casualty Company</td><td>25143</td></tr><tr><td>INSURER B :</td><td>State Farm Mutual Automobile Insurance Company</td><td>25178</td></tr><tr><td>INSURER C :</td><td></td><td></td></tr><tr><td>INSURER D :</td><td></td><td></td></tr><tr><td>INSURER E :</td><td></td><td></td></tr><tr><td>INSURER F :</td><td></td><td></td></tr></tbody></table>	INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A :	State Farm Fire and Casualty Company	25143	INSURER B :	State Farm Mutual Automobile Insurance Company	25178	INSURER C :			INSURER D :			INSURER E :			INSURER F :	
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INSURER C :																					
INSURER D :																					
INSURER E :																					
INSURER F :																					
<b>INSURED</b> Sigma Risk Management Consulting, LLC 3945 N I-10 Service Rd W Ste 200 Metairie, LA 70002																					

## COVERAGES

## CERTIFICATE NUMBER:

## REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVR	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:	Y	Y	98-BQ-S880-6 F	01/01/2022	01/01/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 BUSN PROPERTY \$ 41,500
	<input type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	206 8809-C16-18E	03/16/2022	09/16/2022	COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ 1,000,000 BODILY INJURY (Per accident) \$ 1,000,000 PROPERTY DAMAGE (Per accident) \$ 1,000,000 \$
	<input type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<input checked="" type="checkbox"/> <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/>	N/A	Y	98-CG-F540-9 F	01/01/2022	01/01/2023

## DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Full Named Insured: Sigma Risk Management Consulting, LLC, Sigma Forensic Accounting, LLC, Sigma Actuarial Consulting Group, LLC and Sigma Consulting Corp

Location of operations: 3333 W Napoleon Ave Ste 200 Metairie, LA 70001 & 3945 N I-10 Service Rd W Ste 200 Metairie, LA 70002  
Employee Dishonesty coverage of \$10,000 with a \$250 deductible

## CERTIFICATE HOLDER

## CANCELLATION

**For Information Purposes Only**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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