



4845 US Highway 271 North, Pittsburg, Texas 75686

January 22, 2015

Life Insurance Company of the Southwest
15455 Dallas Parkway, Suite 800
Addison, TX 75001

RE: New TIPS Awarded Contract

Category – 457 Defined Contribution Plans
Contract Number - 1012215

CONTRACT AWARD

Congratulations! The Interlocal Purchasing System (TIPS) Board of Directors of Region VIII Education Service Center has awarded a contract for 457 Defined Contribution Plans under Contract Number #1012215 to Life Insurance Company of the Southwest. This contract will be in effect from 1/22/15 through 1/22/18. The contract will be reviewed internally on an annual basis for reported sales.

CONTRACT ADDENDUMS

Only items submitted on the original proposal can be sold through this contract. If you need to change pricing or add products this can be done through an Addendum to your Awarded Contract. You can only add items that are in the same category. Email the request to add products or change pricing to kim.thompson@tips-usa.com.

2% REPORTING OF SALES TO TIPS

Awarded Vendor will receive a TIPS Sales Submission Report monthly. This report must be completed and returned to TIPS with the 2% of sales from TIPS Members for sales paid during that month. If no sales were paid, then no report is due. We prefer to have a spreadsheet or excel file with the following information: date of purchase, member name, member state, product name, amount, quantity, total amount of sale and 2% due. **IT IS A REQUIREMENT THAT WE HAVE BACK UP INFORMATION SUBMITTED WITH THE SUBMISSION CHECK THAT IDENTIFIES THE MEMBER NAME, STATE, SALE AMOUNT, AND the 2% AMOUNT.**

PROCESSING PURCHASE ORDERS

Awarded Vendor MUST direct TIPS members to email all PO's as a pdf attachment to the email, to TIPSPO@tips-usa.com. TIPS office will validate purchase orders and forward to you as the Awarded Vendor for processing by EMAIL. **Awarded Vendor must CLICK and OPEN the PURCHASE ORDER** in the link provided in the email which will send a reply to TIPS that the PO is being processed by the vendor. Member will receive an email confirmation of the PO process and a link to print a letter of authorization for their files.

DOING BUSINESS IN WEST VIRGINIA

If your company can serve members in West Virginia, you must review, agree, sign and forward by US Mail the enclosed **RESA-8 TERMS AND CONDITIONS** document in the addressed envelope. If you do not sign and mail this document, then your company will not be afforded the opportunity to sell products or services to any of the West Virginia Members through the TIPS Vendor Awarded Contracts. **Do not return this form to the TIPS, Form must be mailed** to the **RESA-8 Office in West Virginia at 109 South College Street, Martinsburg, West Virginia 25401**. You must have this document signed by RESA 8 prior to selling products through TIPS to WV members.

VENDOR WEB PAGE REVIEW

Go to www.tips-usa.com Click on Members then Contracts. Take a moment to review the information posted for your company. Notify the TIPS office at 866-839-8477 of changes. If you would like to have your company logo displayed on your vendor page, you may email it to TIPS at tips@tips-usa.com in the format listed and we will be glad to add it to your vendor page. It must be in the following size range. (jpg size 250x250 Pix ONLY).

SETTING UP VENDOR LOGIN AND PASSWORD FOR TIPS

Awarded Vendors must set up their own TIPS Login and Password. Here are the instructions:

1. Go to www.tips-usa.com/admin/teamlogin.cfm
2. Click on TIPS ADMINISTRATIVE TEAM LOGIN.
3. Click on FORGOT YOUR PASSWORD?
4. Choose your company's name. Enter your name -name must match the Primary Contact's Name on the Awarded Vendor's Contract which is listed on the TIPS Website at www.tips-usa.com (Click on Members. Click on Contracts. Click on "All CONTRACTS". Scroll down alphabetically until you find your vendor name then click on it. There you will find listed the Primary Contact's Name and Email Address).
5. Enter Primary Contact's Email Address (must match Primary Contact's email address).
6. An email will be automatically sent to the Vendor Primary Contact's Email Address with a temporary password. After the password is received, Login to: www.tips-usa.com/admin/teamlogin.cfm Enter:
Username: This is the email address
Password: Use the new password that was emailed to the primary contact.
7. After you have successfully logged in the first time, you can change your password. Instructions: Click on MY ACCOUNT – CHANGE PASSWORD. Then enter the Temporary Password – Enter the New Password – Then Verify the New Password – click on CHANGE IT.

Not all information can be changed by the vendor. If you are not able to update some information, notify the TIPS Office at tips@tips-usa.com and request a vendor contract change. Some changes may require Board Action through an Addendum to the Vendors Contract. (i.e. name change, product changes, pricing, etc...)

You can also set up additional account users for your company. These users will not have the ability to make changes to the vendor profile. But they will be able to access TIPS Membership Information which will assist them in identifying new members for sales transactions. To SET-UP ADDITIONAL USERS: Click on Authorized Users – Click on Add Users. Fill in the required fields of information then click ADD. NOTE: the only person who can set up additional users is the Primary Contact for the Vendor Contract.

SIGNING UP NEW TIPS MEMBERS

Awarded Vendors assist TIPS by signing up new TIPS members. New members bring in additional sales for all TIPS Awarded Vendors. Membership forms (Interlocal Agreement and Board Resolution) are available on the TIPS website. Click on Members then Click on Membership and scroll down to the appropriate state.

NEWSLETTER SUBMISSIONS

Awarded Vendors may submit "white papers" or vendor related articles for publication in the TIPS monthly newsletter that is emailed to over 3000 members. Send your submissions to the newsletter to tips@tips-usa.com.

Sincerely,

Kim Thompson

TIPS Cooperative Coordinator

CERTIFICATE OF AWARDED CONTRACT



Awards
Life Insurance Company of the Southwest
an Awarded Vendor Contract
For
457 Defined Contribution Plans
Contract #1012215

Contract Effective Dates
Year One - 1/22/2015 – 1/22/2016
Year Two - 1/22/2016 – 1/22/2017
Year Three - 1/22/2017 – 1/22/2018

***Contract will automatically renew on the contract date if both parties agree and vendor has reported TIPS Sales during the previous 12 months.**

Dr. David Fitts
Executive Director
Region VIII ESC



Visit www.tips-usa.com for details on this Awarded Vendor