

American Maritime Officers Plans

American Maritime Officers Plans (AMOP) Defined Contribution

Request for Information

2 West Dixie Highway
Dania Beach, FL 33004

SUMMARY

ORGANIZATION NAME	American Maritime Officers Plans
ADDRESS	2 West Dixie Highway, Dania Beach, FL 33004
SEARCH TYPE	Investment Consultant
SEARCH SIZE	\$654,000,000
ACCOUNT TYPE	Defined Contribution Plan

BACKGROUND

American Maritime Officers Plans (AMOP) is soliciting information in an open-invitation Request for Information (RFI) round for the evaluation of an Investment Advisor. A Request for Proposal (RFP) round will follow for selected candidates only. AMOP is also simultaneously conducting an [RFI round](#) and an RFP round for its defined benefit plan. Interested parties may submit for the defined benefit plan, all three defined contribution plans, or for all plans. This RFI is for the **three defined contribution plans**, the American Maritime Officers Defined Contribution Plan, the American Maritime Officers 401(k) Plan, and the American Maritime Officers Money Purchase Benefit (Plans).

AMOP is a multi-employer benefit plan administrator that administrates benefits per the terms of the collective bargaining agreements (CBAs) maintained by and between U.S. flag merchant fleet carriers for which Plans participants are employed and the American Maritime Officers labor union as well as affiliated unions. The Plans are administered by three separate boards of trustees (Boards).

The finance committee (the Finance Committee) of the Plans is established by the Boards. The purpose of the Finance Committee is to assist the Boards with fulfilling their fiduciary obligation with respect to overseeing and monitoring plan investments, ensuring compliance with the applicable investment policies, and ensuring that all plan resources are used appropriately.

Defined Contribution Plans and Scope of Service:

Assets: \$654 million

Incumbent Advisor: Morgan Stanley, hired in 2006

- **Investment Services:** Review and monitor investment options in the plan and proactively identify potential additions/replacements of funds, under a traditional consulting model. The Consultant will be expected to lead conversations and lend expertise where requested to topics that arise as the Finance Committee aims to continually improve performance.
- **On-Site Investment Review Meetings:** Lead a presentation with the Finance Committee 3 times per year in various locations (but primarily Florida) and conference calls as needed with the subcommittee of the Board.
- **Fiduciary Contract:** ERISA 3(21) fiduciary contract in writing.
- **Investment Policy Statement (IPS) Review:** Develop/Review, monitor, and adhere to the IPS.

INSTRUCTIONS

The InHub RFP management platform is being used to conduct this search. Access can be requested [here](#). Proposals must be submitted through this technology only, prior to the deadline.

Please communicate with AMOP regarding questions on this RFI through the **Communications: Public Questions** section of InHub only – contacting any member outside of this process may result in disqualification. All RFI Q&A will be viewable by all bidders. Any questions regarding the technology can be directed to support@theinhub.com.

TIMELINE

CANDIDATE QUESTIONS ALLOWED UNTIL

Friday, July 6, 2018 5:00 PM EDT

RESPONSES DUE

Tuesday, July 10, 2018 5:00 PM EDT