# Invitation to Tender for the provision of Pension Advisory Services.

Issued: 09/02/2024

Deadline for receipt of a request

for clarification: 12.00 midday Friday 16 February 2024

Deadline for receipt of

tender responses: 12.00 midday Friday 1 March 2024

# THIS DOCUMENT IS ALSO AVAILABLE IN WELSH

# Introduction

This document invites tenders from individuals, companies and organisations interested in and capable of supplying to S4C Pension Advisory Services as more specifically described in the following pages.

This Invitation to Tender (ITT) is divided into the following parts:

Part 1 Background Information

Part 2 Contract Specific Information

Part 3 Information to be included in Tender Responses

Part 4 Outline of Tender Process and Requests for Further Information

Part 5 Evaluation Criteria and Contract Award

Part 6 Legal Notes

Appendix 1 Draft Contract

Appendix 2 Evaluation Matrix

Appendix 3 Basic Information Form

# Please read this Invitation to Tender carefully. Tender responses that do not comply with the requirements set out in this Invitation to Tender may not be evaluated as part of this tender process.

**Please note that this tender process, including this Invitation to Tender, is subject to the legal notes set out in Part 6.**

**Part 1 Background Information**

* 1. **S4C**

S4C is the Welsh television channel and one of the UK's five public service television broadcasters. It is an independent broadcasting authority established under the Broadcasting Act 1981 and is regulated under the Communications Act 2003 and the Broadcasting Act 1990.

S4C provides a broad range of high quality and diverse programming in the Welsh Language available on digital platforms including Freeview, Freesat, Sky and Virgin. In addition S4C is available to watch live and on demand on S4C Clic and BBC iPlayer and numerous social media platforms e.g. YouTube, Facebook etc.

For further background information about S4C, please refer to the Annual Report 2022/2023, available on the S4C website (s4c.cymru) or by contacting the Viewers’ Hotline.

0370 600 4141 hotline@s4c.cymru

# Part 2 Contract Specific Information

* 1. **S4C’s requirements**

S4C employs 121 staff across three locations, being Cardiff, Carmarthen and Caernarfon.

S4C has a Group Personal Pension with Aegon. Further details are contained in the draft contract in Appendix 1. Historically, S4C staff were offered membership of the Ofcom Pension Plan, a defined benefits scheme (DB Scheme). This was closed to new members in 1996 and the accrual benefits for active members ceased in 2011. Some of S4C’s current workforce are members of this scheme as deferred pensioners.

* 1. **Services Required**

S4C is looking to appoint a provider of pension services from 5 April 2024 to provide the services described below across its three locations (the “Services”):

* + 1. providing the interface between S4C/its employees and the group scheme and its provider from time to time;
		2. dealing with group scheme administration, such as enrolling new members in the group scheme where required by S4C and providing them with scheme documentation and processing changes in members’ personal details or instructions;
		3. advising new Employees of S4C on their pension options and processing any pension switches or transfers;
		4. providing investment advice to S4C Employee members on their choice of funds within the group scheme and processing any fund switches;
		5. providing individual reviews as required, such as existing fund review reports, retirement options reports and lifetime allowance reports;
		6. advising and assisting S4C Employee members on their pension options when leaving S4C and processing their options where applicable;
		7. advising and assisting S4C Employee members in connection with their retirement from S4C, including advising on the drawing of benefits and processing the payment of benefits;
		8. providing general pension regulatory updates to S4C Employees on matters which may affect them;
		9. alerting S4C to any pension regulatory changes which may affect it, advising on their implications and assisting with implementing any changes which may be required;
		10. ensuring that any group scheme documentation issued to S4C Employees are updated and remain compliant with tax and legislative provisions;
		11. assisting S4C Employee members with miscellaneous pension enquiries and assisting in resolving any pension-related problems;
		12. assisting S4C with compliance with the auto-enrolment requirements; and
		13. from time to time, reviewing and benchmarking the provider of S4C’s group scheme, making recommendations to S4C and assisting with implementing any change of provider.

Any reference to ‘advice’ or ‘advising’ in the services above refers to making formal specific recommendations to a member, which would constitute FCA regulated advice.

The Services will include attending site visits at all S4C’s offices from time to time, including its offices in Cardiff, Carmarthen and Caernarfon, and conducting one-to-one meetings with S4C Employee members, as well as providing general S4C Employee presentations where appropriate. Written material will include individual written reports as well as issuing standard scheme packs to S4C Employee members. The Services will also include attending meetings with S4C personnel responsible for S4C’s pension matters.

The successful provider is not expected to advise S4C Employees in relation to the DB Scheme, but a working knowledge of members’ entitlement under the DB Scheme may be required in order to provide holistic advice to S4C Employee members on their pension situation. For the avoidance of doubt, the successful provider will not be required to provide advice in respect of transfers from the DB Scheme.

The successful provider will be required to advise those retiring or leaving S4C on their pension options and on the claiming of benefits, but otherwise will not be expected to advise any members who are no longer employed by S4C.

# Contract Duration and Terms

The draft contract is attached in Appendix 1.

The contract will be for a period of 2 years with the option for S4C to extend for a further year.

S4C will expect the successful applicant to commence performance of the contract on 8 April 2024.

S4C will review the contract and the successful supplier's performance after the first three months and reserves the right to terminate the contract at the end of this period following such a review. This review will be in addition to any regular reviews that are provided for in the contract.

Please note that no negotiation of the draft contract is permissible once the tender has been given to the successful Tenderer. Amendments to the draft contract to reflect the successful tender response and/or to clarify the terms of the draft contract only are permitted. By submitting a tender response Tenderers are agreeing, if successful, to enter into a contract with S4C in the form set out in Appendix 1. Tenderers are asked to note the provisions of Part 6.3 in this respect.

# Parent Company Guarantees and Consortia

Please also note that S4C may require the successful Tenderer to provide a parent company guarantee. If a consortium submits a tender response which is acceptable to S4C, S4C may in its discretion require: (i) the consortium to form a legal entity before entering into the contract; and/or (ii) joint and several liability of all consortium members; and/or (iii) guarantees and/or undertakings by some or all of the consortium members in respect of some or all other consortium members.

# Part 3 Information to be Included in Tender Responses

* 1. **Required Information**

Tenderers should provide the following information as part of the tender response in order to demonstrate in detail how S4C’s requirements will be met:

* + 1. Completed **Basic Information Form** in the form set out in Appendix 3.
		2. A method statement setting out how S4C’s requirements **(as described in 2.1) will be met** including the ability to deliver the services in Welsh and English across 3 locations, and any added value which the Tenderer would offer. The Tenderer should clearly set out how each requirement will be ensured.
		3. Details of the **relevant experience** of the Tenderer in providing similar services during the last three years including details of at least 2 clients who could provide a reference..
		4. Details of the **key personnel** responsible for carrying out the service, including their job titles, relevant qualifications and relevant experience.
		5. A detailed breakdown of the **fee(s)** required to provide the Services along with a suggested payment schedule. See Part 3.2 for more information.
		6. Any legal comments arising out of the Legal Notes and Contract Document set out in Appendix 1.

Respondents may include additional information where relevant to their responses, but responses should not include any extraneous information not specifically requested or required by this Request including, for example, sales literature and standard terms of trading.

Responses must remain open for a period of 3 months from the date for submission of responses.

If at any time a respondent (or, in the case of a response submitted by a consortium, any member of the consortium) becomes aware that any information which it (or, in the case of a response submitted by a consortium, any member of the consortium) has provided to S4C in connection with this process is incomplete, inaccurate or misleading in any respect or has ceased to be correct, S4C must be immediately notified thereof.

# Fee(s)

S4C is looking for a cost-effective fee proposal which provides it with a high degree of certainty about the fee level for providing the Services. As a guide, S4C envisages a time commitment of approximately 2 days per month for providing the Services, although this could fluctuate from time to time.

It is expected that the term of the contract will last 2 years from 8 April 2024 with the option for S4C to extend for a further year. S4C expect the fee to remain fixed throughout these periods.

If a fixed fee is proposed, respondents should state clearly which (if any) part of the Services would not be provided within the fixed fee and also state clearly any assumptions on which their fixed fee is based.

All fee proposals should be quoted exclusive of VAT.

Respondents should also state how travel time, disbursements and any other non-inclusive costs should be dealt with.

# 3.3 Maximum Pages

Tenderers should seek to be concise in drafting their response to this ITT. Tender responses should not exceed 20 A4 pages in length and the font size should be no smaller than Verdana 10. S4C retains the right to exclude from the tender process any tender response that does not conform with this requirement.

# Part 4 Outline of Tender Process and Requests for Further Information

* 1. **Outline of Tender Process**

|  |  |  |
| --- | --- | --- |
| Stage 1 | Deadline for requests for clarification | 12.00 midday, 16 February 2024 |
| Stage 2 | Provide responses to requests for clarification |  23 February 2024 |
| Stage 3 | Deadline for receipt of tender responses | 12.00 midday 1 March 2024 |
| Stage 4 | Commencement of evaluation of tender responses | 4 March 2024\* |
| Stage 5 | Notification of Successful Tenderer/Contract Award | 11 March 2024\* |
| Stage 6 | Signature of Contract | 28 March 2024\* |

Please note that dates marked \* may be subject to change.

# Submission of Tender Responses

Tenderers are required to submit a tender response in Welsh or English clearly marked ‘Tender for the provision of Pension Advisory Services’ and sent by e-mail to: tendr@s4c.cymru by the deadline for receipt of tender responses set out in Part 4.1 above.

Tenders may be submitted in Welsh or English. A tender submitted in Welsh will be treated no less favourably than a tender submitted in English.

NO TENDER RESPONSES RECEIVED AFTER THE DEADLINE FOR RECEIPT OF TENDER RESPONSES SET OUT IN PART 4.1 ABOVE OR RECEIVED BY S4C AT AN ADDRESS OTHER THAN THAT SET OUT ABOVE WILL BE CONSIDERED AND ANY SUCH TENDER RESPONSES WILL BE EXCLUDED FROM THIS TENDER PROCESS.

S4C accepts no responsibility for the shortcomings of any delivery system or for any lost, delayed or defective tender responses. It is up to Tenderers to ensure that their tender responses (and any attachments) are prepared in good time (taking into account the possibility of staff absences or technical failures) and are submitted in advance of the deadline for receipt of tender responses set out in Part 4.1 above.

Please note that 6Mb is the maximum email size that S4C can accept and permissible file formats are Word, Excel, PDF and Jpeg. These file formats are acceptable as Zip Files. You should be aware that your own ISP (Internet Service Provider) may impose lower limits on the maximum email capacity and as such are advised to check the size limit with their own ISP or IT department well in advance of despatch and deadline.

Proof of despatching will not be deemed to be proof of delivery and you are advised to seek an acknowledgement of receipt in a separate email.

# Consideration of Tender Responses and Notification of Result

S4C will consider all tender responses received by S4C in compliance with the requirements detailed in this ITT and all information obtained from in accordance with the procedure and criteria detailed in Part 5 below. The award of the contract will be based on S4C’s assessment of the tender response that is the most economically advantageous in accordance with the criteria set out in Part 5 below. All Tenderers who submitted a tender response will be notified of the outcome of S4C’s evaluation by email. See further Part 5.4 below.

# Clarification of Tender Responses

S4C may require Tenderers to provide further information and/or clarification of any matters contained in their tender responses. However, the expectation is that Tenderers include any information which they wish S4C to consider in their tender response.

# Requests for Further Information

All contact in relation to this tender process including any requests for further information and/or guidance in completing tender responses must be made by email to S4C at tendr@s4c.cymru.

Tenderers must not in any way canvass or solicit information relating to this tender process from any other officer, employee, agent or adviser of S4C.

Tenderers are encouraged to identify any further information and/or guidance that they may require in connection with this tender process as early as possible. The deadline for submission of requests for further information and/or guidance is **12:00 midday on 16 February 2024**. Any requests received after this deadline will not be considered. S4C will endeavour to deal promptly with all requests received before this deadline.

In the interests of fairness and transparency please note that all requests for further information and/or guidance in respect of this tender process and S4C’s responses to such requests will be disclosed to all Tenderers. Such disclosures will be made by posting such responses on the S4C website at s4c.cymru/tenders.

If Tenderers consider any request for further information and/or guidance that they make to be commercially sensitive, they must clearly mark the request as “commercially sensitive” and supply the reasons why they consider it to be commercially sensitive. Please note, however, that S4C will determine, in its sole discretion, whether it considers any such request to be commercially sensitive. If S4C determines that a request is commercially sensitive S4C will not disclose the request or its response to such request to other Tenderers. If S4C determines that a request is not commercially sensitive it will inform the Tenderer. If the Tenderer agrees that the request is not commercially sensitive S4C will respond to the request and will be entitled to disclose the request and its response thereto to all Tenderers. If the Tenderer does not agree that the request is not commercially sensitive or does not inform S4C whether or not it so agrees within a period of one working day, the request shall be deemed to be withdrawn and S4C will not respond to it. Nothing in this paragraph will be interpreted or construed as limiting in any way S4C’s ability to disclose any information to any person in complying with its freedom of information obligations as outlined in Part 6.5 below.

Any requests and any responses thereto which are disclosed to all Tenderers will be deemed to form part of this ITT..

# Part 5 Evaluation Criteria and Contract Award

* 1. **Compliance Testing**

Prior to commencing formal evaluation of tender responses, S4C will check tender responses, in particular the Basic Information Form and the specific language requirements, to ensure that they are fully compliant with the requirements of the ITT. Non-compliant tender responses may be rejected. Fully compliant tender responses will be evaluated by S4C in accordance with the provisions set out in this Part 5.

# Evaluation

The contract will be awarded on the basis of the most economically advantageous tender. To assess which tender response is the most economically advantageous, a panel of S4C representatives will evaluate and score all responses to this ITT in accordance with the following criteria and weightings:

# Compliance Questions:

Requirements 3.1.1 (Basic Information Form) and 3.1.6 (legal comments) will not be scored. The Basic Information Form must be completed in full and sections 2 to 4 will be assessed on the following ‘pass/fail’ basis.

|  |  |  |
| --- | --- | --- |
|  | **Evaluation Criteria**  | **Evaluation Method**  |
| Section 2 | Basis for Mandatory Exclusion | **Acceptable** – Completed with each response being “No”, or “Yes” with evidence of acceptable remedial action**Unacceptable** – Incomplete or any one or more responses being “Yes” without evidence of acceptable remedial action.  |
| Section 3 | Basis for Discretionary Exclusion | **Acceptable** – Completed with each response being “No”, or “Yes” with evidence of acceptable remedial action**Unacceptable** – Incomplete or any one or more responses being “Yes” without evidence of acceptable remedial action. |
| Section 4 | Additional ModulesInsurance | **Acceptable** – Completed with each response being “Yes” **Unacceptable** – Incomplete or any one or more responses being “No”.  |
|  | Equality | **Acceptable** – Completed with response to Q1 and Q2 being “No”, or “Yes” with evidence of acceptable remedial action, and with response to Q3 being “Yes”.**Unacceptable** – Incomplete or response to Q1 and/or Q2 being “Yes” without evidence of acceptable remedial action, and/or response to Q3 being “No”.   |
|  | Environmental Management | **Acceptable** – Completed with response to Q1 being “No”, or “Yes” with evidence of acceptable remedial action, and with response to Q2 being “Yes”.**Unacceptable** – Incomplete or response to Q1 being “Yes” without evidence of acceptable remedial action and/or response to Q2 being “No”. |
|  | Health and Safety | **Acceptable** – Self-certification completed and response to Q2 being “No”, or “Yes” with evidence of acceptable remedial action and response to Q3 being “Yes”.**Unacceptable** – Self-certification incomplete or response to Q2 being “Yes” without evidence of acceptable remedial action and/or response to Q3 being “No”. |
|  | Data Protection | **Acceptable** – Self-certification completed and response to Q2 being “No”, or “Yes” with evidence of acceptable remedial action and response to Q3 being “Yes”.**Unacceptable** – Self-certification incomplete or response to Q2 being “Yes” without evidence of acceptable remedial action and/or response to Q3 being “No”. |

**Qualitative questions**:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Requirement and method of scoring**  | **Score**  | **Expressed as %** | **Weighting** | **Weighted Score (%)** |
| **3.1.2 Method Statement***Has the Tenderer clearly set out how each essential requirement will be ensured in an accessible, user-friendly, professional, authoritative, and reasonably practicable manner?* | **1-5** |  | **.26** |  |
| **3.1.3 Relevant Experience***Has the Tenderer provided a comprehensive description of the relevant experience of the Tenderer in providing similar services during the last three years including details of at least 2 clients who could provide a reference?*  | **1-5** |  | **.17** |  |
| **3.1.4 Key Personnel***Has the Tenderer provided a list of key personnel responsible for carrying out the service including their job titles? Do the individuals listed have the relevant qualifications and relevant experience?*  | **1-5**  |  | **.17** |  |
| **3.1.5 Fees (see below)** | **Lowest fee divided by Tenderer’s submitted fee** |  | **.40**  |  |

**Appendix 2** contains the matrix which sets out how the information required in Part 3.1 2 to 3.1.4 above will be evaluated in accordance with these criteria.

**Fee Evaluation**

S4C will evaluate the fee(s) provided by all Tenderers using the following formula: lowest fee provided as part of the tender divided by the Tenderer’s submitted fee. S4C may exclude responses that have provided abnormally low fees. The service fee will be weighted at **40%**.

# Disqualification of Tender Responses/Tenderers

S4C reserves the right to disqualify a tender response and/or a Tenderer from this tender process at any time if:

1. a tender response does not comply in any respect with the requirements of this ITT;
2. any information provided to S4C by the relevant Tenderer (or, in the case of a consortium, any of its members), is incomplete, inaccurate or misleading in any respect or ceases to be correct;
3. the Tenderer has colluded with any person (excluding, where the Tenderer is a consortium, collusion between consortium members in relation to the

consortium’s tender response) in relation to or in connection with its or any

other Tenderer’s tender response.

Disqualification of any tender response or Tenderer will be without prejudice to any other rights or remedies of S4C.

# Contract Award

Subject to the provisions of Part 6.1 below and following completion of the evaluation of tender responses, S4C will inform Tenderers of the results of the evaluation. The Tenderer whose tender response has been successful will be required to enter into an agreement with S4C in the form of the draft contract. No contract will be formed unless and until S4C executes the agreement. No oral or written acceptance of any tender or notification that a Tenderer has been successful will constitute a contract.

# Part 6 Legal Notes

* 1. **No Obligation to Offer the Contract**

Nothing contained in this ITT nor any communication between S4C and a Tenderer regarding the tendering process or the tender response shall constitute a contract for the provision of any service covered by this tender process nor a warranty or a representation that any contract will or may be awarded.

S4C reserves the right to withdraw from and/or abandon and/or defer this tender process at any time, not to award any contract as a result of this tender process, to supplement, revise and/or clarify the terms and conditions of this ITT and/or to require Tenderers to clarify their tender responses and/or to provide additional information in relation thereto.

# Conflict of Interest

Tenderers are required to provide details if it is envisaged that there may be a conflict of interest between individuals involved in the application and S4C staff, this is to enable S4C to ensure that it assigns staff to the tender process that have no personal relationship with any Tenderer or consortium member of relevant staff.

# Draft Contract

The draft contract for the provision of the Services is set out in Appendix 1.

Any comments on the draft contract must be included in your application as set out in Part 3.1. Otherwise, by submitting your tender you are deemed to have accepted the terms and conditions of the draft contract.

Notification of comments on the contract in your tender does not mean that they are agreed by S4C. S4C reserves the right to amend the draft contract after publication once the details of the winning bid are known to conform with the deal specific terms agreed with the successful Tenderer. If following the award of the tender, the contract is not finalised satisfactorily S4C reserves the right to award the tender to an alternative applicant or to re-tender the contract.

# Codes of Practice and Guidelines

The successful Tenderer will be required to comply with the following codes of practice, legislation and guidelines (amongst others):

* Health and Safety Legislation
* S4C Data Protection and Privacy Policies
* S4C Statement of Commitment to Diversity

Each Tenderer should include the cost of complying with the above (including to cost of appropriate advice) within the application. Many of these guidelines are available on the

S4C Production Website which is available at [http://www.s4c.cymru/en/production/page/1154/guidelines/.](http://www.s4c.cymru/en/production/page/1154/guidelines/)

# Freedom of Information

S4C is subject to the provisions of the Freedom of Information (“FOI”) Act 2000. If any Tenderer considers that any information supplied by it to S4C pursuant to this invitation is commercially sensitive or confidential in nature, this should be highlighted explicitly and the reasons for its sensitivity set out in full in the tender response. Please note, however, that identifying information as confidential or commercially sensitive does not guarantee that it will be exempt from disclosure. S4C retains the discretion to decide whether or not particular information is exempt from disclosure.

# Data Protection

By submitting a response, you confirm that you have informed all individuals identified in the tender response that you will share their personal data in this way. You acknowledge that S4C will process all personal information provided as part of your response in accordance with the General Data Protection Regulation 2016 and the Data Protection Act 2018. S4C’s Privacy Notice is available at [www.S4C.cymru,](http://www.s4c.cymru/) and you will inform every individual whose personal details are provided to S4C of this clause 6.6. S4C will process any personal data provided in your tender response on the basis that it is in yours and S4C’s legitimate interest to process all data provided by you as part of the tender response for the purpose of evaluating the tender response.

# Confidentiality and Publicity

By submitting a response to this tender, Tenderers agree to keep confidential any information which is disclosed or otherwise made available to them by S4C in any medium whatsoever during or in connection with this tender process. Tenderers shall not to use such information for any purpose other than the preparation of the tender response and shall not to disclose such information to any person other than in confidence and on a need to know basis to those persons who are directly involved in the preparation of the tender response. Such obligations of confidentiality shall not apply to documents already in the public domain at the time it is disclosed or made available to them by S4C.

By submitting a response to this tender Tenderers agree not to, and agree to ensure that their employees do not, issue any publicity of any kind (including but not limited to notices via social networking sites such as Facebook or Twitter or otherwise) regarding the subject of this tender or any decision of S4C in relation to any element of this tender unless S4C has provided prior written consent to such communication.

# Disclaimer

S4C gives no warranty or representation regarding the completeness or accuracy of any information contained in this ITT and any reliance placed on any such information by you is at your own risk.

# Tender Costs

Each Tenderer shall be responsible for its own costs and expenses incurred in connection with this tender process. S4C will not under any circumstances contribute towards any such costs and expenses.

# Amendments to Tender Documents

S4C reserves the right to make changes to the tender documents prior to the deadline set out in Part 4.1 above. To allow time for such amendment to be taken into account S4C may, at its discretion, extend the dates set out in Part 4.1 above.

# Copyright

S4C owns the copyright in the ITT and any other materials issued or made available by S4C. Tenderers are not permitted to copy, reproduce, use or issue copies of the ITT or such materials (or any part thereof) other than as and to the extent strictly required for the preparation and submission of their tender responses.

# Non-Collusion

By submitting a response to this ITT, each Tender certifies that:

* + 1. the tender response is bona fide and intended to be competitive;
		2. the Tenderer has not fixed or adjusted the response by or under or in accordance with any agreement or arrangement with any other person (other than, in the case of a consortium, the other consortium members) or required any other Tenderer to do the same; and
		3. the Tenderer has not communicated to any person other than S4C the amount or approximate budget or price of the tender response, except where the disclosure, in confidence, was necessary to obtain insurance premium or other quotations required for the preparation of the tender.

# Inappropriate Conduct

If a Tenderer or an appointed advisor to a Tenderer makes any attempt to inappropriately influence this tender process or the award of the contract in any way, S4C may disqualify that Tenderer’s tender response in S4C's absolute discretion. Any direct or indirect canvassing by a Tenderer or an appointed advisor to a Tenderer in relation to this procurement or any attempt to obtain information from any of the employees or agents of S4C concerning another tendering organisation may result in disqualification at S4C’s sole discretion.

# Governing Law

This ITT shall be governed by the laws of England and Wales and each Tenderer agrees, by returning a tender response, to submit to the exclusive jurisdiction of the courts of England and Wales.

# APPENDIX 1

# DRAFT CONTRACT

# SUBJECT TO CONTRACT

(See attached document)

# APPENDIX 2

**EVALUATION MATRIX**

|  |  |
| --- | --- |
| **0** | **Completely fails to meet required standard or does not provide a proposal.** |
| **1** | **Proposal significantly fails to meet the standards required and/or contains significant shortcomings.** |
| **2** | **Proposal falls short of achieving expected standard in a number of identifiable respects.** |
| **3** | **Proposal meets the required standard in most material respects but is lacking or inconsistent in others.** |
| **4** | **Proposal meets the required standard in all material respects.** |
| **5** | **Proposal meets the required standard in all material respects and exceeds some or all of the major requirements.** |

**APPENDIX 3**

**BASIC INFORMATION FORM**

(See document attached)