



INTERLOCAL AGREEMENT
Education Service Center Region 10
Contracting Parties

Education Service Center Region 10 (ESC Region 10)
and Coppell Independent School District (the “Agency”)

This Interlocal Agreement is effective _____ (“Effective Date”) and shall remain in effect for the period beginning with the Effective Date and for a term of 2 (number of years) thereafter (“Term”). This Interlocal Agreement shall continue unchanged for successive twelve-month periods following the Term unless either party gives written notice to the other party of the intent to terminate prior to thirty (30) days before the end of the Term.

Statement of Services to be Performed: Provide Financial Wellness services to the Agency and its employees. Such services are described in the Financial Wellness Program – Services Agreement (“Agreement”) for such services between Region 10 and the Provider of services, TCG Advisors, LP. The terms of the Agreement are incorporated herein by reference. A copy of the Agreement shall be provided to each participating Agency.

Authority for such services is granted under sections 791.001 through 791.015 and 791.025 of the Government Code, V.T.C.A. as amended.

Role of ESC Region 10

1. Provide for the organizational and administrative structure of the program.
2. Conduct a Request for Proposals process to select the Provider for the program that it believes offers the best combination of cost and value.
3. Provide staff time necessary for efficient operation of the program.
4. Facilitate the delivery of the services purchased.

Role of the Member Agency:

1. Commitment to participate in the program as indicated by an authorized signature in the appropriate space below
2. Designate a contact person for the cooperative.
3. Commit to purchase the services designated herein.
4. Accept the services from vendor(s) in accordance with standard procedures of the Agency.
5. Pay Provider in a timely manner for all goods and services received in accordance with their fee schedules.
6. Supply employee data in good order to the Provider.
7. Promote the program to employees.

Fees:

The Agency hereby selects the level of services to be provided to its employees as designated below. The Agency may also elect to have the Provider offer financial planning and individual financial counseling service to any Executive/Leadership employee at a cost of \$550 per eligible employee as determined by Agency.

- _____ Financial Modules only. Fee: \$5.00 per Client Employee
- _____ Financial Modules **PLUS** Calculators and Planning Toolkit. Fee: \$7.00 per Client Employee
- _____ Financial Modules **PLUS** Calculators and Planning Toolkit **PLUS** Workshops and Advisor Access. Fee: \$10.00 per Client Employee
- _____ Financial Modules **PLUS** Calculators and Planning Toolkit **PLUS** Workshops and Advisor Access **PLUS** Executive Financial Coaching. Fee: \$10.00 per Client Employee plus \$550.00 per Executive/Leadership employee with such employees determined by Agency

In addition, for Agencies with 2,000 or more eligible Client Employees (as defined by Agency and Provider), Provider may cap the total annual fee at an amount less than the per Client Employee Fees listed above, depending on the level and types of services requested and the term of the Services purchased. Annual total maximum fee for Agency (if applicable): _____

Authorization:

Please send a signed Interlocal Agreement to ESC Region 10, Attn: Dr. Gordon Taylor, Executive Director, Education Service Center Region 10, 400 E. Spring Valley Rd., Richardson, TX 75081.

Agency: _____

Education Service Center Region 10

By _____
Authorized Signature

By _____
Authorized Signature

Title

Gordon Taylor

Title

Date

Date

Contact Person

Contact Person

Title of Contact

Telephone Number

Street Address

City, State

E-mail Address

Telephone Number