

## **Request For Proposals #270 (“RFP”) Tax Advisory Services - Question & Answer # 2**

This Question & Answer #2, including any appendices attached hereto (the “Addendum”), amends and clarifies Request For Proposals #270 (“RFP”) Tax Advisory Services, as previously amended and clarified (the “RFP”). The RFP otherwise remains unchanged and any capitalized words not defined herein have the meaning ascribed thereto in the RFP.

4. Can OAG confirm that a Bidder is not disqualified if the Bidder staffs the engagement with professional resources that have not provided tax advisory services to RCM during the past two years?

**Answer:** With respect to Mandatory Requirement M-1, a proposal meets this requirement if the Bidder declares, in a form and content satisfactory to the OAG, that the proposed resources have NOT undertaken work with the Royal Canadian Mint in respect of tax advisory services within the previous 2 years.

5. Page 1 of the RFP, states that the budget for this engagement is \$125,000 (inclusive of any eligible expenses and applicable taxes). Can you please confirm that this budget limitation is for all 3 years of the contract?

**Answer:** The expenditure estimated on page 1 of the RFP includes the initial three (3) year term and the two (2) additional one (1) year option periods.

6. Page 8 of the RFP, under “Qualifications, Competencies and Other Requirements of the Contractor Personnel” section, the education requirement state that all proposed resources (Partner, PM and Senior Auditor) must have “Accounting Designation (CPA,CA, CPA,CGA or CPA,CMA) and public accounting license.” And this is in addition to years of tax experience. In our experience, the resources having the combination of public accounting licence and many years of tax experience are very rare, almost impossible to find. Can the Client confirm that in addition to the tax experience required, the public accounting license is also required? Will the Client amend the education requirement to read: “Accounting Designation (CPA,CA, CPA,CGA or CPA,CMA) or public accounting license.”

**Answer:** The OAG is satisfied with the minimum education and designation requirements for the Partner personnel category

specified in section IV (Qualifications, Competencies and Other Requirements of the Contractor Personnel) of Section 2 (Statement of Work) of the RFP on page 8, which requires an accounting designation (CPA,CA; CPA,CGA; or CPA,CMA) and a public accounting license (emphasis added).

With respect to the Manager and Senior Auditor category only, the OAG hereby amends the minimum education and designation requirements specified in section IV (Qualifications, Competencies and Other Requirements of the Contractor Personnel) of Section 2 (Statement of Work) of the RFP on page 9 by deleting the requirement for a public accounting license.

The OAG continues to require a university degree for all personnel categories and, for the Partner and the Manager personnel category only, membership with the Canadian Tax Foundation. There is no change to the minimum experience qualifications for any of the various categories of Contractor Personnel that are specified in section IV (Qualifications, Competencies and Other Requirements of the Contractor Personnel) of Section 2 (Statement of Work) of the RFP on page 8 and 9.

For greater certainty, the table of minimum education and designations, and experience qualifications for various categories of Contractor Personnel that are specified in section IV (Qualifications, Competencies and Other Requirements of the Contractor Personnel) of Section 2 (Statement of Work) of the RFP on page 8 and 9 is replaced with the following table:

Level	General Support
Partners	
1. Education and Designations	<ul style="list-style-type: none"> <li>• Accounting Designation (CPA,CA; CPA,CGA; or CPA,CMA) and public accounting license</li> <li>• Member of the Canadian Tax Foundation</li> <li>• University Degree</li> </ul>
2. Minimum Experience	<p>10 years public accounting, including 5 years directing major assignments; and/or</p> <p>10 years tax experience, that includes both Canadian corporate tax and U.S. sales and income tax, including 5 years directing major assignments</p>
Managers	

1. Education and Designations	<ul style="list-style-type: none"> <li>• Accounting Designation (CPA,CA; CPA,CGA; or CPA,CMA)</li> <li>• Member of the Canadian Tax Foundation</li> <li>• University Degree</li> </ul>
2. Minimum Experience	8 years public accounting including 3 years managing major assignments and 5 years tax experience, that includes both Canadian corporate tax and U.S. sales and income tax
<b>Senior Auditors</b>	
1. Education and Designations	<ul style="list-style-type: none"> <li>• Accounting Designation (CPA,CA, CPA,CGA or CPA,CMA)</li> <li>• University Degree</li> </ul>
2. Minimum Experience	5 years public accounting including supervisory experience and 4 years tax experience, that includes both Canadian and U.S. tax