

EXHIBIT A
VERIFICATION

I Charles B. Friedlander [*name*], hereby state that I am the President & Chief Actuary [*position title*] of Municipal Finance Partners, Inc. [*firm name*] and I am authorized to make this verification.

I hereby verify that the facts set forth in the foregoing Act 44 Disclosure Form for Contractor providing Professional Services to the Upper Perk Police District are true and correct to the best of my knowledge, information and belief.

Act 44 disclosure requirements apply to Contractors who provide professional pension services and receive payment of any kind from the Requesting Municipality's pension fund.

I also understand that knowingly making material misstatements or omissions in this form could subject the Contractor to termination of services.



Signature

December 9, 2024

Date

DEFINITIONS FOR DISCLOSURE

Term:	Definition:
Contractor	Any person, company, or other entity that receives payments, fees, or any other form of compensation from a municipal pension fund in exchange for rendering professional services for the benefit of the municipal pension fund.
Subcontractor or Advisor	Anyone who is paid a fee or receives compensation from a municipal pension system – directly or indirectly from or through a contractor.
Affiliated Entity	Any of the following: <ol style="list-style-type: none"> 1. A subsidiary or holding company of a lobbying firm or other business entity owned in whole or in part by a lobbying firm. 2. An organization recognized by the Internal Revenue Service as a tax-exempt organization under section 501(c) of the Internal Revenue Code of 1986 (Public Law 99-514, 26 U.S.C. § 501 (c) established by a lobbyist or lobbying firm or an affiliated entity.
Contributions	As defined in section 1621 of the act of June 3rd, 1937 (P.L. 1333, No. 320), known as the Pennsylvania Election Code.
Political Committee	As defined in section 1621 of the act of June 3rd, 1937 (P.L. 1333, No. 320), known as the Pennsylvania Election Code.
Executive Level Employee	Any employee or person or the person’s affiliated entity who: <ol style="list-style-type: none"> 1. Can affect or influence the outcome of the person’s or affiliated entity’s actions, policies, or decisions relating to pensions and the conduct of business with a municipality or a municipal pension system; or 2. Is directly involved in the implementation or development policies relating to pensions, investments, contracts or procurement, or the conduct of business with a municipality or municipal pension system.
Municipal Pension system	Any qualifying pension plan, under Pennsylvania state law, for any municipality within the Commonwealth of Pennsylvania; includes the Pennsylvania Municipal Retirement System.
Professional Services Contract	A contract to which the municipal pension system is a party that is: (1) for the purchase of professional services including investment services, legal services, real estate services, and other consulting services; and, (2) not subject to a requirement that the lowest bid be accepted.

IDENTIFICATION OF CONTRACTORS & RELATED PERSONNEL

Contractors: (see "DEFINITIONS FOR DISCLOSURE" on the prior page) Any entity who currently provides or is seeking to provide service(s) by means of a Professional Services Contract to the Municipal Pension System of the Upper Perk Police District please respond completely to all required disclosure items.

The Municipal Pension plan(s) for which you are providing information:

- Upper Perk Police District Pension Plan

Following is a list of Upper Perk Police District Board officials and employees with oversight or administrative responsibilities for the pension plans:

- Diane Stevens
- Patrick Suter
- Richard De Angelis
- Keith Goodwin
- Adam Krisko
- Michael Mensch
- Wayne Stevens
- Cheryl Heintz

1. Please provide the names and titles of all individuals providing professional services to the Upper Perk Police District's pension plan(s) identified above. Also include the names and titles of any advisors and subcontractors of the Contractor, identifying them as such. After each name, provide a description of the responsibilities of that person regarding the professional services being provided to each designated pension plan.

**Charles B. Friedlander, President & Chief Actuary, Municipal Finance Partners, Inc.
Provision of Administrative and Actuarial Services to the pension plan.**

2. Please list the name and title of any Affiliated Entity and their Executive-level Employee(s) that require disclosure; after each name, include a brief description of their duties. (See: Definitions)

N/A

3. Are any of the individuals named in Item 1 or Item 2 above a current or former official or employee of the Upper Perk Police District? If "yes", provide the name of the person employed, their position with the District, and their dates of employment.

No

4. Are any of the individuals named in Item 1 or Item 2 above, a current or former registered Federal or State lobbyist? If "yes", provide the name of the individual, specify whether they are/were a State or a Federal lobbyist, and the date of their most recent registration / renewal.

No

NOTICE: All information provided for items 1- 4 above must be updated with Board as changes occur.

IDENTIFICATION OF CONTRACTORS & RELATED PERSONNEL (CONTINUED)

5. Since December 17, 2009, has the Contractor or an Affiliated Entity paid compensation to, or employed any, third party intermediary, agent, or lobbyist that is to directly or indirectly communicate with an official or employee of the Municipal Pension System of the Upper Perk Police District or any municipal official or employee of the Board in connection with any transaction or investment involving the Contractor and the Municipal Pension System of the Upper Perk Police District?

This question does not apply to an officer or employee of the Contractor who is acting within the scope of the firm's standard professional duties on behalf of the firm, including the actual provision of legal, accounting, engineering, real estate, or other professional advice, services, or assistance pursuant to the professional services contact with District's pension system.

If "yes", identify: (1) whom (the third party intermediary, agent, or lobbyist) was paid the compensation or employed by the Contractor or Affiliated Entity, (2) their specific duties to directly or indirectly communicate with an official or employee of the Municipal Pension System of the Upper Perk Police District or any municipal official or employee of the Board or Upper Perk Police District (3) the official they communicated with, and (4) the dates of this service.

No

6. Within the past two years, has the Contractor, or any agent, officer, director, or employee of the Contractor solicited a contribution to any municipal official or candidate for municipal office in the Board or Upper Perk Police District to the political party, or political action committee of that official or candidate? If "yes", identify the agent, officer, director or employee who made the solicitation and the municipal officials, candidates, political party or political action committee who were solicited (to whom the solicitation was made).

No

7. Within the past two years, has the Contractor or an Affiliated Entity made any contributions to a municipal official or any candidate for municipal office in the Upper Perk Police District? If "yes", provide the name and address of the person(s) making the contribution, the contributor's relationship to the Contractor, the name and office or position of the person receiving the contribution, the date of the contribution, and the amount of the contribution.

No

8. Does the Contractor or an Affiliated Entity have any direct financial, commercial or business relationship with any official of the Upper Perk Police District or Board? If "yes", identify the individual with whom the relationship exists and give a detailed description of that relationship. A written letter is required from the Upper Perk Police District acknowledging the relationship and consenting to its existence. The letter must be attached to this disclosure. Contact the Upper Perk Police District to obtain this letter and attach it to this disclosure before submission.

No

9. Has the Contractor or an Affiliated Entity given any gifts having more than a nominal value to any official, employee, or fiduciary of the Upper Perk Police District? If "yes", provide the name of the

person conferring the gift, the person receiving the gift, the office or position of the person receiving the gift, specify what the gift was, and the date conferred. **No**

10. Disclosure of contributions to any political entity in the Commonwealth of Pennsylvania Applicability: A "yes" response is required, and full disclosure is required ONLY WHEN ALL the following applies:

- a. The contribution was made within the last 5 years
- b. The contribution was made by an officer, director, executive-level employee or owner of at least 5% of the Contractor or Affiliated Entity.
- c. The amount of the contribution was at least \$500 and in the form of:
 - i. A single contribution by a person in (b) above, OR
 - ii. The aggregate of all contributions all persons in (b) above;
- d. The contribution was for:
 - i. Any candidate for any public office or any person who holds an office in the Commonwealth of Pennsylvania;
 - ii. The political committee of a candidate for public office or any person that holds an office in the Commonwealth of Pennsylvania.

If "yes", provide the name and address of the person(s) making the contribution, the contributor's relationship to the Contractor, the name and office or position of the person receiving the contribution (or the political entity / party receiving the contribution), the date of the contribution, and the amount of the contribution. **No**

11. With respect to your provision of professional services to the Municipal Pension System of the Upper Perk Police District:

Are you aware of any apparent, potential, or actual conflicts of interest with respect to any officer, director, or employee of the Contractor and officials or employees of the Upper Perk Police District?

If "yes", provide a detailed explanation of the circumstances which provide you with a basis to conclude that an apparent, potential, or actual conflict of interest may exist.

NOTE: If, in the future, you become aware of any apparent, potential, or actual conflict of interest, you are expected to update this Disclosure Form immediately in writing by:

- o providing a brief synopsis of the conflict of interest, and or an explanation of the steps taken to address this apparent, potential, or actual conflict of interest. **No**

12. To the extent that you believe that Chapter 7-A of Act 44 of 2009 requires you to disclose any additional information beyond what has been requested above, please provide that information below or on a separate piece of paper. **N/A**