EXPRESSION OF INTEREST (EOI) SUBMISSION FORM

For the Procurement of

Selection of an Actuarial Consultancy Firm to Conduct a Long-Term Financial Sustainability Assessment for the Lalith Athulathmudali Mahapola Higher Education Scholarship Trust Fund over a Twenty-Five (25)-Years.

< Name of the Consultancy Firm>

<Address>

1. PROFILE OF THE CONSULTANCY FIRM

Item	Information to be provided
1.1 Name of Consultancy Firm	
1.2 Legal status (Sole Proprietorship / Partnership / Private Limited Company / Other – specify)	
1.3 Date and place of establishment / incorporation	
1.4 Company / business registration number and registering authority	
1.5 Country of registration	
1.6 Name(s) of proprietor / partners / directors	
1.7 Brief profile of the firm, including principal areas of professional practice and organisational capacity	
1.8 Number of years in professional practice	
1.9 Relevant years of experience in actuarial analysis, actuarial valuation or long-term financial sustainability assignments	

2. PROFESSIONAL ACTUARIAL QUALIFICATION AND ELIGIBILITY

The applicant shall provide details of at least one qualified employee who is a member of a professional actuarial body recognised by the Insurance Regulatory Commission of Sri Lanka.

Item	Details of Qualified Actuarial Professional
2.1 Full name	
2.2 Position / designation in the firm	
2.3 Name of professional actuarial body	
2.4 Membership / qualification category and membership number	
2.5 Date of admission / qualification	
2.6 Relevant professional experience (years)	
2.7 Employment status (permanent / full-time / other)	

Item	Details of Qualified Actuarial Professional
2.8 Supporting documents attached (membership certificate, qualification evidence, employment confirmation)	

3. RELEVANT EXPERIENCE OF THE CONSULTANCY FIRM

Provide details of assignments relevant to actuarial valuation, financial modelling, pension funds, insurance funds, trust funds or long-term financial sustainability studies. Give preference to assignments completed during the past five (05) years. Attach documentary evidence such as client certificates, completion letters or contract extracts where available.

No.	Name of assignment and client	Period / duration	Nature of services provided and relevance to this assignment	Contract value (LKR / other currency)	Evidence attached
1					
2					
3					
4					
5					

4. EXPERIENCE WITH GOVERNMENT AND PUBLIC SECTOR / INTERNATIONAL AGENCIES

Provide details of relevant assignments undertaken for Government institutions, public sector organisations, statutory bodies or international agencies.

No.	Name of institution / client	Assignment and services provided	Period	Contact person / reference (if available)
1				
2				
3				
4				

5. PROPOSED KEY PROFESSIONAL PERSONNEL

Provide details of the Lead Actuary and other key professionals proposed to undertake the assignment. Attach a current Curriculum Vitae (CV) and relevant qualification / membership evidence for each person.

No.	Name and proposed position	Academic / professional qualifications	Years of relevant experience	Area of specialisation / role in this assignment
1	Lead Actuary			
2	Financial Modelling Specialist			
3	Other Key Expert			
4	Other Supporting Professional			

6. OFFICE ADDRESS AND CONTACT DETAILS

Item	Information
6.1 Registered office address	
6.2 Principal business address (if different)	
6.3 Contact person and designation	
6.4 Telephone number	
6.5 Fax number (if applicable)	
6.6 Email address	
6.7 Website (if applicable)	

7. CHECKLIST OF SUPPORTING DOCUMENTS

Please tick the documents submitted with this EOI. The applicant should attach additional evidence where necessary.

No.	Supporting document	Attached (Yes / No)
7.1	Copy of certificate of incorporation / business registration	
7.2	Company profile and organisational information	

No.	Supporting document	Attached (Yes / No)
7.3	Evidence of membership / qualification of at least one professional actuary in a body recognised by the Insurance Regulatory Commission of Sri Lanka	
7.4	Evidence that the qualified actuary is employed by the Consultancy Firm	
7.5	Details and documentary evidence of relevant assignments	
7.6	CVs of the Lead Actuary and other proposed key professionals	
7.7	Copies of relevant academic and professional qualifications of proposed key personnel	
7.8	Any other information supporting the firm's eligibility and capacity (please specify)	

8. DECLARATION

We, the undersigned, hereby declare that:

- the information and statements made in this Expression of Interest and its attachments are true, complete and accurate to the best of our knowledge;
- the Consultancy Firm meets, or has disclosed any qualification or eligibility matter relevant to, the minimum requirements stated in the EOI notice and TOR;
- the professional personnel identified in this submission are proposed by the firm for the assignment, subject to the requirements of the subsequent RFP and any approval required;
- we understand that the information submitted may be verified by the Ministry / LAMHESTF and that any material misrepresentation may result in disqualification; and
- we understand that submission of this EOI does not guarantee shortlisting or award of the consultancy.

Name of Consultancy Firm: ……

Name of authorised signatory: ……

Designation: ……

Signature: …… **Date:** ……

Official seal of the firm: