

RFP 19-01 Items for Discussion and Information at Presentation

1. We are looking to consolidate 3 managers. We have looked at the possibility of 1 or 2 managers and believe that given the diverse nature of the proposals received, we will consolidate to 2 managers for better diversification.
2. If copies are provided of the presentation, approximately 10 copies should suffice.
3. Our top priority in coming years is to achieve the \$10 million goal for our Partnership Project.
4. We have an attorney on staff to review governing documents. This RFP is specifically for investment management services.
5. Specific items to be addressed should include any changes to fee structure, philosophy, etc. as a result of allocating between 2 managers versus consolidating down to 1 manager.