

RFSO 20160150 – Investment Consulting Services

Question 1:

On page 12 of the RFSO, section 3.2.3 Minimum Criteria, Criteria 2 states: “For the Project Stream(s) the Proponent is submitting for, the Proponent must have provided general investment consulting services to at least (5) clients that are taxable corporate investors, pension funds, or foundations and endowments with assets of at least \$1 billion.”

We would like to confirm that the \$1 billion figure cited is not on a cumulative basis. In other words, a Proponent must have 5 clients who each have at least \$1 billion.

Response:

That is correct, each client should have assets of at least \$1 billion to demonstrate that the proponent has worked with mid-to-large sized institutional clients.

Question 2:

Question 12 of Section 4.4 Offeror’s Qualifications, requests provision of 3 references. Question 4 of Section 4.6 Offeror’s Client Relationships requests provision of client references for each Project Stream. If the three references provided under Question 12 in aggregate or separately cover all three Project Streams, is that sufficient?

Response:

Yes that is sufficient, assuming the same clients are being referenced for all three streams, and the Proponent has worked with these clients on mandates similar to the project streams being referenced.

Question 3:

Section 4.3 requests the use of the table of content numbering system identified in 4.1. However, that numbering system does not match the numbering system used in the rest of Section 4. Should we use the numbering system in 4.1 or the one used in the rest of section 4?

Response:

Remove:

4.1 Overview of Section 4

Offers are to be organized and submitted in accordance with the instructions in this section. Offers should be organized into the following Response Item sections.

Response

- 4.2 Covering Letter
- 4.3 Table of Contents
- 4.4 Offeror’s Qualifications
- 4.5 Response to Statement of Goods and/or Services
- 4.6 Project Management Plan
- 4.7 Financial Information
- 4.8 Pricing

Replace with:

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