

REQUEST FOR PROPOSALS: INVESTMENT MANAGEMENT SERVICES



I. INVITATION

Family Promise of Brevard, Inc., a Florida 501(c)3 not-for-profit organization, is issuing a Request for Proposals (RFP) from Brevard County established investment management firms to provide professional services per our Investment Policy Statement.

Firms with relevant experience in providing investment management services to perform the services outlined herein, are encouraged to submit a proposal.

Family Promise of Brevard has opted to use the “Qualifications-Based Selection” process for this effort.

The purpose of the RFP process is to identify the firms and proposals Family Promise of Brevard, Inc. determines are best suited to support this effort. Following an analysis of the responses to this RFP, firm(s) may be invited for interviews. The firm ultimately awarded a contract will provide services as directed by the Family Promise of Brevard Investment Policy Statement (FIN010).

All questions concerning this RFP shall be directed, via email, to info@familypromiseofbrevard.org, within 14 days after posting of the RFP to allow adequate time for response and/or addendum.

II. SELECTION CRITERIA

Proposers are encouraged to keep their qualification proposals concise and to include a minimum of marketing materials. At a minimum, each Proposal must address the following criteria:

MINIMUM CRITERION:	POINTS ASSIGNED
General Firm Information/Administration	30
Investment Mgt Experience of the Firm’s assigned team	30
Fees structure	40
TOTAL POINTS POSSIBLE	100

III. RISK

Proposers responding to this RFP do so at their sole expense and risk. Subsequent to the issuance of this Request for Qualifications, the Family Promise of Brevard reserves the right to:

- Make changes to the RFP.
- Cancel this RFP.
- Request clarifications.
- Negotiate modifications to proposals.
- Reject any and all proposals for any reason whatsoever; and
- No Proposer is guaranteed the award of an Agreement or any work as a result of being selected or short-listed for this project.

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IV. SUBMISSION REQUIREMENTS

A. Submittal Documents:

- a. One (1) electronic copy

B. Submittal Content (in the order listed below):

- a. Cover: Shall be titled “*Family Promise of Brevard Investment Management Services*”
- b. First page
 - Name of the firm, lead investment manager, submittal date.
- c. Table of Contents:
- d. Transmittal Letter (contents):
 - Introduction of the firm
 - Summarize why the Respondent believes itself to be the most qualified
 - Statement that to the best of the Respondent's abilities, all information contained in the RFP submittal is complete and accurate
 - Statement granting Family Promise of Brevard, Inc. and its representative authorization to contact any previous client of the Respondent (or a Respondent's Team Member) for purposes of ascertaining an independent evaluation of the Respondent's or a Respondent's Team member's performance
 - Transmittal letter must have the original signature of an officer of the principal responding firm
 - Attestation from Respondent that firm is not a suspended or debarred company.

C. Proposal

- a. Provide a description of the firm’s proposed approach.

D. Team Resumes (optional)

- a. Provide resumes and qualifications of the primary members of the team that will be assigned to work on and be responsible for the successful completion of the project.

Submittals shall be delivered via email to the following addressee on or before June 1,2024 to:
Karin Jamison, Ad-Hoc Committee for Investment Management Services Lead
Family Promise of Brevard, Inc.
info@familypromiseofbrevard.org