

Questions and Responses  
Investment Consultant RFP – Bid #7125  
Select Committee on Deferred Compensation  
Updated as of August 2, 2016

Q. Does the Investment Consultant need to be a Registered Investment Consultant (RIA)?

R. The Select Committee on Deferred Compensation will expect the investment consultant to be an RIA as outlined in the RFP requirements.

Q. What was the date of the last service provider review(s) and could you provide copies of the reports?

R. The Annual Plan Review is done each November. The Select Committee would prefer to see an example of the type of Plan Review your firm has done for other clients.

Q. Has the current consultant conducted a service provider vendor search for the County?

R. Yes.

Q. Does the County contemplate any future consulting services to include vendor search services?

R. Potentially, yes.

Q. What is the investment consultant's current fee schedule and/or the amount paid last year for the services?

R. Information on current fees will not be provided during the RFP process. Requests made for information (related to fees or past reports, etc.) under the Wisconsin Open Records Law should be submitted to the contact listed on the RFP.