



Request for Proposals Questions and Answers Investment Management Services Private Credit

1. Clarification on Search process

- As described in the RFP, candidates are requested to submit information relevant to the Private Credit search including but not limited to firm information, capabilities, experience managing Private Credit discretionary mandate, details of discretionary accounts you currently manage, etc. for Phase I – Request for information. The document should be no more than 5 pages and there are no questions nor templates for this submission. Candidates are not required to submit additional documents nor Exhibits during this phase.
- Following Phase 1, we will identify high caliber candidates to participate in Phase 2 – Sample portfolio construction.
- IPOPf will identify highest caliber candidates from Phase 2 to participate in Phase 3 – Request for proposal and submit a comprehensive proposal including Exhibits.
- Any firm that meets the minimum criteria may submit a proposal if they so choose. Minimum qualifications are specified on the RFP

2. Where can candidates locate Exhibit 2?

- There is no template for Exhibit 2 – Fee Proposal. Candidates may use their standard template for Exhibit 2.

<Updated 7/22/2024 >