



## / Opportunities

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Finance / General Services

### **Long Term Investment Program (LTIP) Investment Consulting Services RFP**

The purpose of this solicitation is to select an investment consultant (Company) that will partner with the City of Charlotte to provide investment consulting services for the City's Long-Term Investment Program ("LTIP") and assist with fiduciary oversight for the City's existing deferred compensation programs and retiree health investment plan.

#### **Details**

Posting Number	2024-Q3(Jul-Sep)-FN-15115
Anticipated Posting Date	2024-08-15
Commodity Code(s):	91849, 94648, 94649, 94656, 95839

#### **Requirements**

**Last Updated: 07/16/24**

## Insurance Requirements

The City requires the awarded vendor(s) to obtain and maintain the following insurance coverage types:

- Automobile-For automobile operations liability
- Crime (Employee Dishonesty)-For the theft of our property by an employee or contractor
- Errors & Omissions / Professional Liability-For negligence or failure to perform in a professional capacity
- General Liability-For bodily injury or property damage, arising from products, premises, completed work, personal & advertising injury
- Network Security-Network Security-for breaching of our network security
- Workers Compensation-For lost wages and medical expenses of injured workers

## Estimated Total Value

The total project value is anticipated to be:

- \$500,000 - 999,999

## Utilization

The City anticipates setting goals for the following types of subcontractor utilization:

- MBE-Minority Business Enterprise

## Contract Term

The term of the project is anticipated to be:

- Multi-Year

## For Questions, Contact:

**Robert Iannucci**

City Contact

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