



/ Opportunities

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:

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City Contact

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