



ADDENDUM # 1

RFP # 092015

Retirement Board Investment
Consultant

THOMAS HICKNER
BAY COUNTY EXECUTIVE

DATE OF ADDENDUM

OCTOBER 7, 2015

REFERENCE PROPOSAL NUMBER

RFP 92015

PROPOSED DATE/TIME REQUIRED

OCTOBER 12, 2015
11:00 AM

SUBMIT PROPOSAL TO:

BAY COUNTY FINANCE
DEPARTMENT
PURCHASING DIVISION
ATTN: FRANCES MOORE
BAY COUNTY BUILDING
515 CENTER AVENUE
7TH FLOOR
BAY CITY, MI 48708-5128

MARK PROPOSAL:

“RETIREMENT BOARD INVESTMENT
CONSULTANT - DELIVER TO
PURCHASING IMMEDIATELY”

ADDENDUM REGARDING: CLARIFICATION QUESTIONS

ADDENDUM ISSUED BY:

Frances Moore

NAME

Purchasing Agent

TITLE

Bay County is removing the requirement listed below:

“Each Individual Advisor Representative who may advise or perform any work for BCERS and VEBA, must be registered with the State of Michigan, possess a Series 65 license and be in good standing with FINRA and the SEC.”

The new requirement, found on page 5, Section II Minimum Qualifications #1 will read as follows:

“The firm must be registered with the SEC as an investment advisor under the Investment Company Act of 1940.”

Thank you.