



Legislation Details

File #: 2023-0232 **Version:** 2 **Name:**
Type: Resolution **Status:** Preliminary Item
File created: 2/14/2023 **In control:** Board of Commissioners
On agenda: 3/28/2023 **Final action:**
Title: Commission District(s): ALL
RFP - Request for Proposals No. 22-500621 Investment Consulting and Procurement Record Keeping Services (Multiyear Contract): for use by the Department of Finance-Risk Management. Consists of providing investment consulting and related services for a public defined contribution plan, such as the County's existing 457(b) Plan and 401(a) Plan. Recommend award to the highest scoring proposer: Segal Advisors, Inc. dba Segal Marco Advisors. Amount Not To Exceed: \$354,000.00.

Indexes:

Attachments: 1. Agenda Notes 2022-0232, 2. User Dept. Rec. Form - 1, 3. BOC Agenda Cumulative Score Report - RFP 22-500621, 4. Evaluation Summary for Agenda Items - 2023-0232

Date	Ver.	Action By	Action	Result
3/28/2023	2	Board of Commissioners	approved	Pass
3/21/2023	2	ERPS-Employee Relations & Public Safety Committee	recommended for approval.	Pass
3/21/2023	2	Committee of the Whole	Accepted to the BOC agenda and assigned	