



NOTICE TO ALL FIRMS

Date: March 9, 2026
To: All Prospective Bidders
From: Sam Li
Director of Procurement Services
Re: Addendum Number 1
IFB # C1630 – Investment Management and Related Services

Questions

Q1. Why is the search was being conducted - contract expiration of current provider, standard due diligence purposes, influx of capital, seeking additional services, etc.?

A1. **Standard due diligence purposes.**

Q2. What firm currently provides the services and who is the institution's lead consultant at the firm?

A2. **J.P. Morgan.**

Q3. Will the incumbent be allowed to rebid?

A3. **Yes.**

Q4. What is the foundation's target asset allocation?

A4. **We are not in a position to share details on this topic at this time.**

THIS ADDENDUM IS PART OF THE CONTRACT DOCUMENT AND SHALL BE INCLUDED WITH YOUR REQUEST FOR PROPOSAL SUBMITTAL. YOUR SIGNATURE BELOW WARRANTS THAT YOU UNDERSTAND THIS ADDENDUM AND THAT YOU HAVE MADE THE APPROPRIATE ADJUSTMENTS IN YOUR PROPOSAL AND CALCULATIONS.

Signature

Print Name and Title of Authorized Representative

Print Name of Company/Partnership/Individual

Date