

Request for Proposal Q00901
Financial Advisor Services
Addendum #1
July 24, 2017

All changes to the Request for Proposal (RFP) are valid only if they are issued by written addendum. Each respondent must acknowledge receipt of any addenda in their proposal submission. Each respondent, by acknowledging receipt of any addenda, is responsible for the contents of the addenda and any changes to the proposal therein. Failure to acknowledge receipt of any addenda may cause the proposal to be rejected. If any language or figures contained in this addendum are in conflict with the original document this addendum shall prevail.

This addendum consists of the following questions received:

1. We are very interested in responding to Harper College's Request for Proposals for Financial Advisor Services. We are looking into fulfilling the BEP requirement, and we anticipate some difficulty due to a lack of eligible firms registered with CMS. We work with a number of BEP certified firms that are registered outside of CMS. Will the College accept BEP firms that are certified with a different agency?

Response: The BEP participation program is an aspirational goal. Currently the College only counts firms that are registered with CMS towards meeting its goal. Firms that are not registered with CMS but have been certified through another jurisdiction should be referred to CMS for certification through their reciprocal program. In the interim, you have the option of working with firms you normally contract with or requesting a waiver by completing the form "Demonstration of Good Faith Efforts to Achieve Goal and Request for Waiver."

Sincerely,

Jewell M. Jackson
Purchasing Manager
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