



COUNTY OF DANE
DEPARTMENT OF ADMINISTRATION
PURCHASING DIVISION

City County Building
210 Martin Luther King Jr. Blvd. Room 425
Madison, WI 53703-3345

GREG BROCKMEYER
Director of Administration

CHUCK HICKLIN
Controller

Date: March 24, 2022
To: All Proposers
Subject: Addendum #1 to RFP# 122034 – Investment Advisor Services

Due to changes made on this addendum, the RFP document has been revised. Please download the 3/24/2022 revised RFP document to submit a proposal - changes are noted in red font.

The following changes have been made:

1. Section 1.5 – Calendar of Events
 - a. Last day to submit written inquiries has been changed to **April 7, 2022**.
 - b. The timeline in which Addendums to the RFP posted are posted to Dane County's Purchasing website has been changed to **April 14, 2022**.
 - c. The deadline for Proposals to be submitted has changed to **April 22, 2022** at 2:00 p.m. (CST).
2. Section 3.3 – Minimum Requirements – Firm Qualifications
 - a. #3. – Must have Assets Under Management (AUM) of at least **\$10 billion** as shown on the current SEC Form ADV.
 - b. #8. – Minimum of **60%** of the current client base are government entities.

Please acknowledge receipt of this addendum by checking the "Addendum #1" box on **Attachment A – Vendor Information** of your bid submission. If you have any questions regarding this addendum, please contact me via phone or email as listed below.

Sincerely,

Pete Patten
Lead Purchasing Officer
608-267-3523
patten.peter@countyofdane.com