

Cherokee Nation

Request for Proposal for Investment Advisor / Consultant

The Cherokee Nation is seeking proposals from highly qualified organizations with substantial investment experience to provide fund consulting services as per the terms and conditions of this RFP. This Request for Proposal (RFP) details the services sought and instructs interested Proposers on the RFP deadlines and selection process. It is anticipated the Cherokee Nation will award an agreement to one successful firm, but reserves the right to award to multiple firms at the Cherokee Nation's sole discretion.

SCOPE OF SERVICES:

A generalized scope of services requested is below.

1. Assignment of senior level personnel to Cherokee Nation's account that will act as a fiduciary in selecting investments, developing investment policies and strategies, and assist comprehensively in the management of the Cherokee Nation Sovereign Wealth Fund. The awarded firm will be expected to be available as requested for on-site meetings and ad-hoc questions by phone and email.
2. Analyze and advise upon performance measurement and benchmarks.
3. Research and develop comprehensive asset allocation strategies.
4. Perform search, due diligence and selection of qualified investment managers, as well as the coordination necessary to manage the contracts, reporting and fee negotiations as well as monitor the performance of the investment managers.
5. Provide training and education to staff and tribal officials, as requested
6. Provide specialty consulting as necessary

Firms that are interested in participating in this Request for Proposal should email Rebecca Mitchell, Director of Acquisition Management, Cherokee Nation at rebecca-mitchell@cherokee.org no later than 12:00 p.m., CST, Friday, August 31, 2018.