



Request for Proposal

May 2, 2022

Ephrata Area Educational Foundation

803 Oak Blvd, Ephrata, PA 17522

717-517-0539 (Phone)

www.ephrataeducationfoundation.org

Introduction:

The Ephrata Area Education Foundation (EAEF) is a 501(c)(3) organization. EAEF supports state-of-the-art teaching methods and technologies that increase student engagement. It also supports the Ephrata School District's early childhood education initiatives for all children. More information can be found at the website listed above.

Purpose of Proposal:

The EAEF is seeking proposals from local financial institutions to manage funds designed to meet long term investment objectives of the EAEF. The goal is to prioritize growth and accumulation of wealth that can be used for funding the EAEF mission objectives over the years to come. The EAEF will still maintain other accounts for its short and mid-term needs. The initial deposit to the investment fund that is the subject of this proposal will be approximately \$100,000.

Requirements:

Chosen Vendors invited to bid have the requirements needed to assist the EAEF. The successful vendor will be based on the following criteria:

1. Willingness to meet with EAEF representatives to report on the performance and management of the investment on a yearly basis and generally be readily available for questions throughout the year.
2. Management and related fees.
3. Current or anticipated support of the EAEF.
4. Ability to effectively communicate specific investment strategies to meet our goals.

Timeline:

The EAEF is interested in receiving proposals by May 28, 2022.

Respond with proposal or follow-up questions jointly to:

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