



July 6, 2020

## ADDENDUM I

### Purchase of Investment Advisory Services CSP No. 20A-016

I. The following is being provided in response to questions received:

- a. I wanted to see why the search was being conducted - contract expiration of current provider, standard due diligence purposes, influx of capital, etc.

**Response:** The current provider's contract expires November 30, 2020.

- b. I had First Southwest Asset Management providing the services and I was not sure if that was accurate. What firm is the incumbent provider, and will they be invited to rebid?

**Response:** The current Contractor is Hilltop Securities Asset Management, LLC. All potential Offerors are encouraged to submit a proposal for this CSP request.

- c. What time frame are finalist interviews/presentations expected?

**Response:** It is anticipated, presentations will occur in September 2020.

- d. When is a selection/award anticipated?

**Response:** The anticipated date of contract award will occur in October 2020.

- e. Am I correct in assuming that the reference to "the purchase of marketing and advertising campaign services with media buying services" as noted on Page 6 was simply an error?

**Response:** Yes, references to Marketing and Advertising were made in error, and are replaced with "Investment Advisory Services."

***The deadline to submit a proposal for this project is by no later than 2:00 p.m. C.S.T., February 25, 2020.***