



September 7, 2018

Dear Sir or Madam:

The Downtown Sheridan Association (DSA) is requesting proposals for portfolio investment management. The DSA is seeking an investment advisor to assist in the management of its funds. The services desired by the Investment Committee from the advisor include advising on appropriate investment philosophy, quarterly performance reports, asset allocation strategy, education and other services as requested.

Currently the Downtown Sheridan Association has around \$60,000 in cash to invest. A copy of our Investment Policy Statement is attached. Please include the following information in your proposal.

1. Briefly explain your firm and employees. Include employee Bios and employees responsible for this account. Explain who will provide brokerage services and who will provide account custody.
2. Explain your investment philosophy and process and the reasoning for investments chosen for this proposal.
3. How would you assist the Downtown Sheridan Association in meeting their fiduciary responsibility?
4. Please comment on your process to assist the maintenance of our investment policy, spending policy and objectives and guidelines for our invested funds.
5. Please attach the proposed fee schedule. Please indicate if brokerage commission are included in a “wrap fee” agreement or if brokerage commissions are paid out of the account.
6. Please include your process for providing performance measurement reports to the Investment Committee. Would you be available to report to the investment committee on a quarterly basis and attend a meeting on at least an annual basis?
7. Include any other information that you feel would be helpful in making a decision on the investment of our funds.

If your firm desires be considered please complete and return a proposal no later than October 15, 2018. Responses can be emailed to Executive Director Zoila Perry at zoila@downtownsheridan.org.

*PO Box 13
121 S. Main Street
Sheridan, WY 82801
(307) 672-8881
downtownsheridan.org*

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Staff

**Zoila Perry,
Executive Director**

**Destiny Park,
Events Coordinator**

Our Mission:

*To preserve, enhance
and promote Historic
Downtown Sheridan to
ensure Future
Prosperity.*

Proposals will be reviewed and applicants will be notified no later than November 1, 2018. If you have any questions please don't hesitate to contact Zoila Perry, Executive Director at 307-672-8881.

Sincerely,

Megan Cook
Treasurer, Downtown Sheridan Association

Peg Martin
President, Downtown Sheridan Association