



December 18, 2025

### **Letter of Inquiry for Investment Management Services**

3 Rivers Community Foundation is seeking proposals to provide discretionary investment advisory services for its \$13M endowment. Interested firms are invited to provide the information requested below. Based on these responses, selected firms will be provided with 3RCF's Statement of Investment Policy along with a (Request for Proposal) RFP. Interviews may be requested.

Please submit the responses below in PDF format (maximum of 5 pages) by January 30<sup>th</sup> to [abbey@3rcf.org](mailto:abbey@3rcf.org).

1. Please share your firm's background and ownership.
2. Please share your firm's investment strategy and philosophy.
3. How are investment decisions made at your firm and who makes them?
4. Beyond investment management, what other services are available at your firm, and do those services generate additional fees?
5. What is your fee range estimate?
6. Please share your firm's experience working with and supporting local nonprofits in Benton and Franklin counties.
7. Who is the team that would be working directly with 3RCF? (please include bios)
8. How is your firm regulated and licensed?

Please note, preference will be given to local firms serving Benton and Franklin counties with a proven track record of supporting the local community and providing fiduciary investment services. The 3RCF Finance Committee is responsible for this selection process and will make a recommendation to the 3RCF Board of Directors.

Thank you,

Abbey Cameron  
CEO