

Addendum #1

From: Teddy Davis, Airlie Foundation Treasurer

To: RFP respondents

Project: **RFP- AIRLIE FOUNDATION INVESTMENT ADVISOR**

Date: September 10, 2015

This addendum is issued regarding questions received in response to “RFP- AIRLIE FOUNDATION INVESTMENT ADVISOR” and is hereby made a part of said Request for Proposals to the same extent as though it were originally therein.

1. Clarification to the statement, “The Firm will be required to provide investment advice on the Endowment Fund based on the established Investment Policy Statement of Airlie Gardens Foundation.”

The reference to our Investment Policy Statement should have been taken out of the RFP. Please see the asset/risk allocation in the RFP as a summary/guideline of our current Investment Policy. The selected firm may be asked to help us re-write our policy. The full Investment Policy Statement will be provided to the firms we select for presentations.