



ENDOWMENT COMMITTEE

Request for Proposal for Investment Advisory Services

1. The Club and its Endowment

Chinese Club of San Marino (the “Club”) is a 501(c)(3) nonprofit organization based in San Marino, California. The club’s primary mission objectives include: (1) establishing and maintaining the Chinese School of San Marino, and (2) promoting mutual understanding between different cultures through community involvement, integration, and education. Established in 1979, the Club serves hundreds of students every year through its afterschool programs and weekend classes, as well as needs of the local community through seminars and events that adhere to the Club’s core mission objectives.

2. Request for Proposal

The Club seeks an experienced individual, team, or firm (the “Firm”) to advise the Endowment Committee and to provide investment management services for assets currently valued at or about \$3.0 million (the “Endowment”). This Request for Proposal (“RFP”) is part of a competitive sealed bid process. This RFP, along with the included questionnaires, provides guidelines and considerations by which the Firm is to be selected and evaluated.

3. Submission Requirements

Only sealed proposals will be accepted. The envelop for the sealed proposals must be labeled “RFP – CCSM Endowment, Investment Advisory Services”. Please deliver four (4) copies of the Firm’s proposal by mail or in person, and email to:

Endowment Committee
Chinese Club of San Marino
2425 Huntington Drive
San Marino, CA 91108
Email: endowment@ccsm.org

The Firm’s proposal must be received by Friday, January 31, 2025 at 5:00 p.m. The Committee will finalize its selection by February 28, 2025.

Please note all materials or reports prepared by the Firm and submitted to the Endowment Committee for purposes of the RFP will become the sole property of the Club.

4. **Reservation of Rights**

The Endowment Committee reserves all rights with respect to the following:

- Rejection of any proposals;
- Amendment and/or cancellation of the RFP process and related guidelines and policies; and
- Solicitation, follow up, negotiation, offer, and/or contract with any Firm(s) regarding its proposal.

5. **Proposal Evaluation Criteria**

The following nonexclusive and non-exhaustive list of criteria will be used to evaluate all of the submitted proposals. The order by which the criteria are listed are not indicative of their importance or priority:

- Composition of the Firm, including the key personnel committed to this project, their experience and track record of performance, and the Firm's capacity to provide high quality services;
- The Firm's relevant experience, qualifications and success in providing relevant services to organizations / institutions similar to the Club and its Endowment;
- The Firm's availability to work with the Endowment Committee on an ongoing basis;
- The Firm's fee proposal including terms;
- Quality of the Proposal; and
- The Firm's references.

Thank you so much for your interest in working with Chinese Club of San Marino. If you have any questions or comments regarding this proposal, please direct your inquiry to:

CCSM Endowment Committee
Atten: Alan Chen, Committee Chair
Email: endowment@ccsm.org

Very truly yours,



Alan C. Chen, Chair
Endowment Committee