



Request for Proposals 2022-066
Financial Advisory Service

ADDENDUM No. 1

ISSUE DATE: May 18, 2022

Responding Offerors on this project are hereby notified that this Addendum shall be made a part of the above named RFP document.

The following items add to, modify, and/or clarify the RFP documents and shall have the full force and effect of the original Documents. This Addendum shall be acknowledged by the Offeror in the RFP document.

Question/Answer Section

1. According to the Securities Exchange Commission, certain persons were listed as being excluded from the definition of municipal advisor IF they engage in specific activities. One of those activities being: a. Person responding to a request for proposals or qualifications from a municipal entity or obligated person in connection with a municipal financial product or issuance of municipal securities. Would the county allow a vendor to move forward with a bid proposal while registration is in motion?

Answer: Vendor should be registered by May 10, 2022.

2. I believe that the County subscribes to DebtBook. If so, would you be able/willing to provide us access to the information for the purposes of accurately modeling/summarizing the County's existing debt obligations?

Answer: The awarded vendor will be provided access to information.

3. Regarding a Certificate of Insurance. Do we need to submit a COI with Union County listed as part of the written proposal or just be prepared to submit one if selected?

Answer: The awarded vendor will be required to submit a COI.

End of Question/Answer Section

End of Addendum No. 1