

REQUEST FOR PROPOSALS (“RFP”)
FOR OHIO ABLE CONSULTING SERVICES

On August 28, 2015, the Treasurer of State’s Office (“Treasurer’s Office”) will issue a RFP for Ohio ABLE Consulting Services. The RFP will be issued by direct request. Respondents interested in receiving the RFP may request a copy via email to ABLE-questions@tos.ohio.gov. Proposals shall be received by the Treasurer’s Office no later than 3:00 PM on September 18, 2015.

The Treasurer’s Office requests proposals from financial organizations to act as consultant to assist the Treasurer’s Office in the establishment and ongoing operation of Ohio’s ABLE plan (“Ohio ABLE”). The Treasurer’s Office is seeking a financial organization with a minimum of five (5) years of investment consulting experience, including experience in matters relating to analysis, evaluation, and selection of mutual funds, fund of funds, and ETFs.

This notice is meant for publication purposes only. Any interested respondents must comply with all submission requirements as detailed in the RFP.

Date	Event
August 28, 2015	RFP available by request at 11:00 a.m. ET
September 4, 2015	Final submission deadline for inquiries by 3:00 p.m. ET
September 9, 2015	All responses to inquiries will be posted on the Treasurer’s Office website by 3:00 p.m. ET
September 11, 2015	Final submission deadline for Notice of Intent to Bid letter by 3:00 p.m. ET
September 18, 2015	Due date for RFP response submissions by 3:00 p.m. ET
On or before September 28, 2015	RFP Respondent finalists notified of date for oral presentations conducted at the Treasurer’s Office; Follow up questions, answers, fee proposal, and agreement discussions