

Nonprofit RFP Evaluation Matrix

Nonprofit Organization RFP Evaluation Matrix for Investment Advisor Selection

Use these questions to determine if the vendor meets your predetermined RFP criteria. The best possible response is 12 affirmative (yes) answers. Choose to eliminate the vendors with the most NO answers.

RFP CRITERIA		QUESTION	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
1.	RIA Firm	Are you a Registered Investment Advisor (RIA) firm?	Y				
2.	Fee-Only	Do you qualify to be a NAPFA fee only firm?	Y				
3.	Fiduciary	Will you acknowledge your fiduciary obligations in writing?	Y				
4.	Independent	Are you independent from banks, brokerage and insurance firms?	Y				
5.	Comprehensive	Will you advise on both our assets and our liabilities?	Y				
6.	Disciplined	Do you have a defined and repeatable investment process?	Y				
7.	Experienced	Do you have experience and expertise serving clients like us?	Y				
8.	Personalized Service	Will you tailor your investment services to meet our needs?	Y				
9.	Cost	Can you provide the annual cost in dollars to retain your firm?	Y				
10.	Conflicts of Interest	Will you manage any conflicts of interest in our favor?	Y				
11.	Third-Party Verification	Is your firm certified by any third party verification services?	Y				
12.	Fiduciary Education	Will you provide fiduciary education to our staff and board?	Y				
Total Number of YES Answers			12				