

RFR Amendment – May 20, 2014
Office of the State Treasurer and Receiver General

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RFR File Name/Title: IRC 457 Deferred Compensation Plan – Investment Management Services: Active Core Plus Fixed Income, Active Unconstrained, Long Only Fixed Income, Active High Yield Bond, Active Core Private Daily Valued Real Estate and Active Bank Loans.

RFR File Number: 14-DC-FIBL & RE

RFR Contact Person: Jameel Moore – procurements@tre.state.ma.us

PLEASE NOTE: THE FOLLOWING MINIMUM CRITERIA FOR ACTIVE CORE PRIVATE DAILY VALUED REAL ESTATE HAS BEEN AMENDED:

Active Core Private Daily Valued Real Estate

Current:

- For the actively managed core private daily valued real estate mandate(s) our firm has proposed, the Portfolio Manager has five years of direct experience with the Subject Product being proposed as of March 31, 2014.

Amended:

- For the actively managed core private daily valued real estate mandate(s) our firm has proposed, the Portfolio Manager has **two years** of direct experience with the Subject Product being proposed as of March 31, 2014.