



Methuen Contributory Retirement System
41 Pleasant Street, Suite 303, Methuen, MA 01844
Tel: 978-983-8620 Fax: 978-983-8972

Appointed Members
John T Sheehy - Robert Sheehan

Chairman
Thomas J. Kelly

Elected Members
Michael Hennessy – Albert J. Trott

Request for Proposals

Manager of Managers or Discretionary/Outsourced CIO Investment Services

The Methuen Retirement Board, which oversees the Methuen Contributory Retirement System, a public pension fund within the Commonwealth of Massachusetts, with an investment portfolio of approximately \$128 million, invites qualified investment managers to submit proposals for active management of its portfolio utilizing an outsourced chief investment officer management strategy for a period not to exceed 7 years.

Proposal Requirements

By responding to this Request for Proposal, the Proposer represents that it is knowledgeable of, or will become knowledgeable of, all applicable provisions of Chapter 32 of the Massachusetts General Laws and with the Investment Regulations promulgated by the Massachusetts Public Employee Retirement Administration Commission (PERAC).

Massachusetts General Laws, Chapter 32 §23B requires mandatory contractual terms and conditions to be incorporated into the contract including provisions. The legislation may be found by accessing the following link:

<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIV/Chapter32/Section23B>

Interested parties should email Thomas J. Kelly at TJKelly@ci.methuen.ma.us and Krysten Wallace at kwallace@ci.methuen.ma.us for a copy of the RFP. Any questions you may have can be communicated via email as well, please No Phone Calls.

The Board reserves the right to seek additional information from, and to schedule interviews with, any and all responders.

The Board reserves the right to reject any and all proposals, to seek further information relative to any and all proposals, to waive any minor non-compliance or non-conformity with the Request for Proposal, and to enter into any agreement deemed by the Board to be in its best interest.

Due Date

All responses to this Request for Proposals must be received by the Methuen Retirement Board on or before Friday, December 29, 2017 by 12 noon. There will be no exceptions made or extensions of time granted.