



Template Request for Proposal – Foundation Investment Manager

September 2022

This template outlines questions to ask when your community foundation is searching for an investment manager. These include questions about the firm’s experience and strategy, information on their fees and information about their client services. Feel free to customize this template to reflect the needs and interests of your foundation.

Firm Overview

1. Provide an overview of your firm and include:
 - a brief history of your firm;
 - assets currently under management; and
 - an overview of your values and corporate culture.

Experience:

2. Describe your experience managing investments for foundations, especially community foundations.
3. Describe your organization’s community activities and involvement.

Investment Strategy:

4. Describe your investment philosophy and process (equities, fixed income, asset allocation, alternatives etc.), including the types of investments you would recommend to meet our investment objectives. Your description should address risk tolerances that would be associated with your approach.
5. Provide a summary of the investment performance you have achieved over the last ten years based on the investment portfolio you would recommend. The performance metrics for the components of the portfolio should be provided for the relevant periods.



6. Provide professional biographical information on the team that would serve the foundation. (Including fund managers/analysts/client servicing personnel)

Feedback on Current Policy:

7. Based on our overall investment objectives, do you have any comments or feedback on our current investment policy?

Fees/Donations

8. Provide a full description of your fees.
9. Provide the details of any commitments to donations your organization would make to our foundation.

Client Service

10. Describe your client service.
11. Describe the reporting provided, including frequency, policy compliance, and fund performance vs benchmarks.

Additional information

12. Please provide any other information that you think would be relevant to the decision on the appointment of an investment manager.

Community Foundations of Canada is grateful for the work and collaboration of Mawer Investment Management in creating this template for community foundations.

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