



Name of Committee Finance Committee

Name of Committee Chairperson Todd Conrad

Date of Report January 15, 2020

Actionable item(s)

1. _____
2. _____
3. _____

Committee Report

The finance committee has started the process of shopping vendors for our reserve account. The first order of business was to give Todd the ability to create a RFP (request for proposal) to send to the following institutions: Merrill Lynch, Wells Fargo, Citi Group, JP Morgan and our existing vendor, Bernstein. We have set a timeline of 30 days to be able to collect the proposals and give the board a recommendation as to what vendor we would like to move forward with.
