

Office of the Illinois State Treasurer
Michael W. Frerichs

Request for Proposals
Illinois Student Investment Account Consumer Protection Advisory Services
370-500-22-032

Addendum 2
May 10, 2022

The Request for Proposals Illinois Student Investment Account Consumer Protection Advisory Services 370-500-22-032 (“RFP”) published by the Treasurer on April 27, 2022, is hereby amended as follows:

1. Section IV.A.9 of the RFP is hereby deleted and replaced with the following:
 9. Cost Proposal – Respondent’s price (“Cost Proposal”) shall include the information provided in Section V.C. The Cost Proposal shall be provided in a separately sealed envelope for all hard copy submissions as outlined in Section V.D or as a separate email with the Cost Proposal as an attachment for all electronic submissions as outlined in Section V.D. All Cost Proposals shall include the pricing for any and all subcontractors.
2. Section IV.A.10 of the RFP is hereby deleted and replaced with the following:
 10. Redacted Copy – If the Proposal contains any information that Respondent considers to be exempt from public disclosure under the Illinois Freedom of Information Act (“FOIA”) (5 ILCS 140) or other applicable laws and rules, Respondent should submit in a separately sealed envelope an additional copy of the Proposal with proposed confidential information redacted, as detailed in Section V.E.10 of this RFP (“Redacted Copy”), or for all electronic submissions as a separate attachment labeled “Redacted Copy.”
3. The paragraph following Section IV.A.10 of the RFP is hereby deleted and replaced with the following:

All hard copy Proposals must be submitted in a sealed envelope or package bearing the title “Office of the Illinois State Treasurer Request for Proposals Illinois Student Investment Account Consumer Protection Advisory Services” and the Respondent’s name and address. The package must include one (1) original and four (4) copies of the Proposal. A separate envelope must contain one (1) original and four (4) copies of the Cost Proposal. In addition, please provide on separate thumb drives an electronic copy of the Proposal, a separate electronic copy of the Cost Proposal and, if Respondent requests confidential treatment of any information it considers to be exempt from public disclosure under FOIA or other applicable laws and rules, Respondent must submit an electronic copy of the

Redacted Copy. All electronic Proposal submissions must follow the process as outlined in Section V.D and include the Cost Proposal as a separate email and properly labeled attachment and, if Respondent requests confidential treatment of any information it considers to be exempt from public disclosure under FOIA or other applicable laws and rules, the Redacted Copy as a separate and properly labeled attachment.

4. Section V.D of the RFP is hereby deleted and replaced with the following:

D. Proposal Submittal

1. Packet submission in hard copy form

Proposals submitted in hard copy form must be submitted in a sealed envelope or package with “Request for Proposals Student Investment Account Consumer Protection Advisory Services 370-500-22-032 for the Office of the Illinois State Treasurer” shown in the front of the envelope or package, along with Respondent's name and address.

If confidentiality of any information is asserted, please include an electronic Redacted Copy in accordance with Section IV.A.10 of this RFP.

Packet must be mailed to:

Mr. Christopher M. Flynn
Chief Procurement Officer
Office of the Illinois State Treasurer
One East Old State Capitol Plaza
Springfield, IL 62701

Proposals will be opened publicly, via livestream only, at 2:00 p.m. CT on June 2, 2022. The livestream will be available online at <https://www.facebook.com/ILTreasurerProcurement>.

2. Packet submission via electronic form

When submitting a Proposal electronically, please e-mail the following to ConsumerProtectionRFP@illinoistreasurer.gov:

- a. name of contact person
- b. business name and business address
- c. e-mail address and telephone number
- d. a complete list of submitted files

3. Use of electronic version of this RFP

This RFP is electronically available. If Respondent electronically submits terms from the RFP, s/he acknowledges and accepts full responsibility to ensure that no changes are made to the RFP. Should a

conflict arise between a version of the RFP in Respondent's possession and the Treasurer's version, the Treasurer's version shall prevail.

5. Section VI.A.3 of the RFP is hereby deleted and replaced with the following:

Provide the Cost Proposal in a separately sealed envelope and on a separate electronic storage device or, if Respondent submits the Proposal electronically, through a separate email with the Cost Proposal as an attachment;

6. All other terms of the RFP remain unchanged.