

Northampton (MA) Retirement System
Request for Proposals
Investment Management Services

The Northampton Retirement Board (NRB) seeks proposals from qualified investment managers for the Northampton Retirement System's entire balanced portfolio. The total market value of the portfolio was approximately \$188 million as of June 30, 2025. The selected firm will be responsible for managing a well-diversified allocation that aligns with the investment objectives and risk tolerance of the NRB.

MINIMUM QUALIFICATIONS

The preferred manager should have experience managing accounts in the range of \$50,000,000 to \$300,000,000, specifically as separately invested balanced portfolios rather than comingled funds. Additionally, the firm must be familiar with and agree to comply with Massachusetts General Laws, Chapter 32, as well as the regulations set forth by the Public Employee Retirement Administration Commission (PERAC) under 840 CMR.

To obtain a copy of the Request for Proposals or to make general inquiries regarding the RFP, please email David Shipka, Administrator, at dshipka@northamptonma.gov with the subject line "Investment Manager RFP".

To ensure a fair and equitable evaluation process, and to ensure all prospective bidders receive the same information, we kindly request that all inquiries regarding this RFP be submitted via email. No phone calls please.

Proposals are due no later than Wednesday, September 3, 2025 at 3:30 PM EST. The address for submissions is:

Northampton Retirement Board
C/o David Shipka, Administrator
240 Main Street, Room 5
Northampton, MA 01060