

SPSCC FOUNDATION 2025 INVESTMENT MANAGEMENT MINIMUM QUALIFICATIONS CERTIFICATION

By signing this document, I hereby attest that the firm submitting this proposal meets all of the following minimum qualifications and is therefore eligible to receive further consideration in this process.

Minimum Qualifications

1. Be a registered investment advisor under the Investment Company Act of 1940;
2. Agree to act as a fiduciary with respect to the SPSCC Foundation;
3. Provide that all management fees will be inclusive—no upfront or custodial fees will be charged and no cost will be incurred to move between fund managers;
4. Have been in business for a minimum of ten (10) years. If the firm has not been in business for at least ten (10) years, the senior principals of the firm must have at least ten (10) years of experience with institutional clients;
5. Have individuals assigned to SPSCC Foundation with a minimum of five (5) years professional experience in the investment consulting field;
6. Employ a professional team or department dedicated to investment research and analysis; and
7. Is based in (or has at least one office in) western Washington.

Signature: _____ Date: _____

Printed Name: _____ Title: _____