

Investment RFP

At the August 24, 2021 investment committee meeting the four responding proposals to the RFP were presented as follows:

1. Regions Bank Institutional Services, 525 Okeechobee Blvd, 7th Floor' West Palm Beach, FL 33401
2. Morgan Stanley, Graystone Consulting Tampa, 100 N. Tampa Street, Suite 3000, Tampa, FL 33602
3. PMA Asset Management, LLC, 7380 Sand Lake Rd., Suite 650, Orlando, FL 32819
4. CHANDLER ASSET MANAGEMENT, INC., 801 International Parkway, Suite 500, Lake Mary, Florida 32746

After a presentation from Caleb Adair, Investment Portfolio Consultant for MCHD, and discussion from the committee it was voted to recommend the Board of Trustees consideration of Regions Bank Institutional Services and Morgan Stanley, Graystone Consulting Tampa at the board meeting on Monday August 30, 2021 at 5pm at the District office located at 2547 East Silver Springs Blvd. Ocala, FL 34470. The committee also recommended that the Board extend the time to consider the two finalists.