



Donald C. Kendig, CPA  
Retirement Administrator

**BOARD OF RETIREMENT**

Steven J. Jolly, Chair  
Dr. Rod Coburn, III, Vice Chair  
Laura P. Basua  
Greg Baxter  
Vicki Crow  
Paul Dictos, CPA  
Robert Dowell  
Eulalio Gomez  
Mary Ann Rogozinski, Alternate

---

DATE: September 11, 2015

TO: Board Legal Counsel Services RFP Respondents

FROM: Becky Van Wyk, CPA  
Assistant Retirement Administrator

SUBJECT: Board Legal Counsel Services RFP Questions

Q. My firm is contemplating submitting a proposal in response to FCERA's request for proposals for legal counsel services. On page 17, the RFP lists as a required appendix to the proposals each firm's annual financial reports. Our annual financial reports are proprietary information that our firm does not release externally. Unfortunately, I believe such information would likely be construed to be disclosable under the California Public Records Act should the agency receive a request. As result, we simply cannot provide this report. I want to make certain that any proposal my firm submits is responsive to the RFP. Therefore, I am inquiring to see whether or not FCERA would be willing to waive this requirement or provide additional guidance as to what financial information it seeks.

A: If your firm is a finalist, we would likely want to review the financial information during an on-site visit. You may consider responding that you are "unable to provide the requested information at this time, but would be willing to discuss disclosure during an on-site visit."