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RFP for Challenged Credit Financial Advisor
Q&A Responses

Question 1
In regards to 5.2.6, what time period should the request list and case studies cover? For transactions/engagements that were not publicly disclosed, may we describe the transaction(s) but not identify/name the institution to protect client confidentiality?
The list and case studies should cover transactions/engagements since January 1, 2022. If there are concerns regarding client confidentiality, you do not need to identify/name the institution.

Question 2
If a firm is planning to respond to the Authority's RFQ for Financial Advisory Services, in addition to the RFP for Challenged Credit Financial Advisor, and a case study is a relevant example for both the RFQ and RFP, would you prefer that (i) we provide the case study in just one of our responses (then cross reference it in the other response); or (ii) include any such case studies in their entirety in both responses, if relevant to the question posed?
Please include relevant case studies in their entirety in both responses.