



## Forsyth County Procurement

Tyra Little, Procurement Director

July 26, 2022

### ADDENDUM #3

#### RFP NO. 22-77-1512 Financial Planning Program

**For: Providing all materials, equipment, and labor for Financial Planning Program for Forsyth County Government.**

This addendum supersedes and supplements all portions of the quote documents and becomes part of the quote documents for the above-referenced project.

Where any item called for in the specifications or indicated on the drawings is supplemented hereby, the original requirements shall remain in effect.

Where any original item is amended, voided, or superseded hereby, the provision of such item not so specifically amended, voided, or superseded shall remain in effect.

Questions/Answers:

1. Do all advisors serving the program need to have a CFP Designation? Our lead advisors are CFPs, but we have licensed support staff aiding in presentation and plan development that are not.

**Answer: Certified Financial Planner (CFP®) designation**

2. Are all employee meetings onsite at the county offices? Are all meetings expected within normal business hours (8 a.m. - 5 p.m.)?

**Answer: All employee meetings are to be held on-site at County-provided offices. Not all meetings are expected to be held within normal business hours. Some staff, such as the Sheriff's Office personnel, do not work normal business hours. Other staff may wish to schedule appointments convenient for their spouse or significant other to attend with them.**

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