

SUMMARY OF COMPETITIVE BIDS ON:		Investment Advisory Management Services		
	DATE ADVERTISED 18-Nov-21	NAME OF BIDDER Beirne Wealth Consulting 3 Enterprise Drive Suite 410 Shelton, CT 06484	NAME OF BIDDER	NAME OF BIDDER
CONTRACT NO.	NAME OF PAPER CT-DAS / TOWN WEBSITE	Qualified Bid: YES		
DATE RELEASED 11/18/2021	DATE OPENED 12/30/2021			
DESCRIPTION Firms that have expertise in advising municipalities or other public entities with regard to investment related services are encouraged to submit a proposal. The scope of services are as follows; Provide professional investment advice and guidance to the Town Treasurer and Board of Finance, ongoing review of adopted investment policy statement and Investment performance management, analysis and reporting.				
TOTAL AMOUNT OF BID		\$1,250.00 per Qtr.		