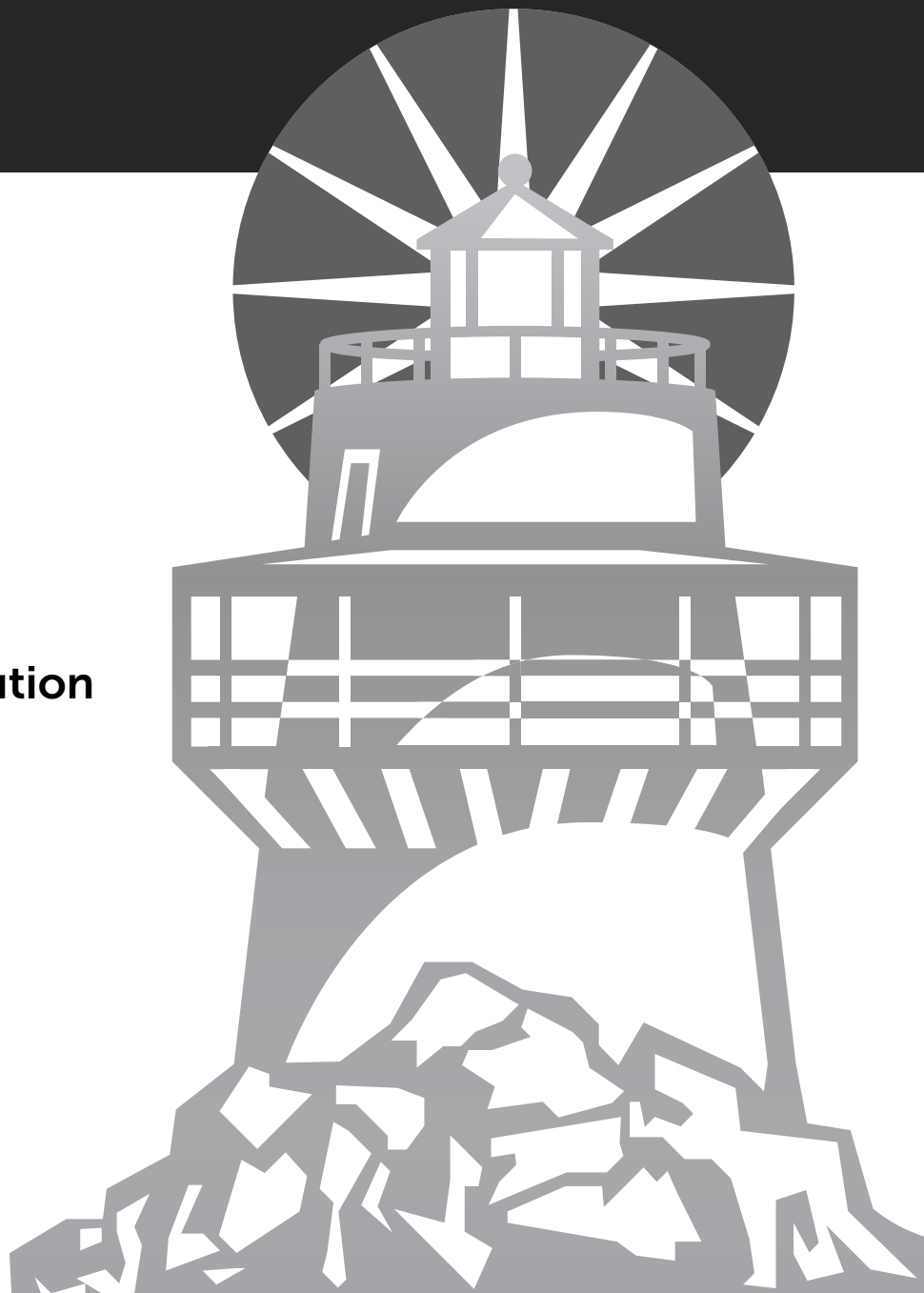


# RFP ENGINEER BY BEACON STRATEGIES

---

Request For Proposal (RFP/RFI) Platform and Services for selection, due diligence, and confirmation of the best provider(s) for your firm.

- ✓ **Built for Wealth Management Firms**
- ✓ **One-Stop to Manage RFP/RFI End-to-End Processes**
- ✓ **Pre-Existing and Solution Focused Templates**



# RFP ENGINEER



## EASY TO USE TOOL TO COMPARE VENDORS ON A LEVEL PLAYING FIELD.

RFP Engineer gives you pre-built questionnaires specifically designed for various business decisions. Templates include: Investment Management, Clearing & Custody, CRM system or others, shortening the effort and time required for RFPs/RFIs. Existing templates can be customized and tailored for your business needs.



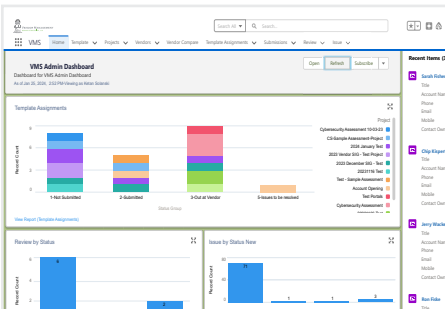
Kick Start your RFP/RFI process with pre-built templates



A sustainable, and repeatable process delivering a level playing field for analyzing responses



Curated support to guide you through your RFP/RFI projects



### DASHBOARDS

Access to reports, reviews, open items, response progress and vendor answer and scoring comparison.

Question	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
<b>1. 1.0 Firm Information &amp; Demographics - General</b>					
1.2 Provide an overview of your company and contractors.	5	1	1	1	5
1.3 List your top five competitors and how you differentiate yourselves from them.	5	1	1	1	5
1.4 List your awards or recognitions your company has received in the past three years.	5	1	1	1	5
1.5 List your physical locations for possible site visits to show evidence of physical security and adequacy of the facility for the intended purpose.	5	1	1	1	5
1.6 Do you have a physical security policy?	5	1	1	1	5
1.7 Please attach electronically a copy of your physical security policy.	5	1	1	1	5
1.8 Is the physical security staff employed via a contracted service?	5	1	1	1	5
1.9 Please list name of the third party security service used.	5	1	1	1	5
<b>2. 2.0 Firm Information &amp; Demographics - Employees</b>					
2.1 How many temporary / contractor analysts do you employ?	5	1	1	1	5
2.2 Is your solution hosted on premises, or Software As A Service (SaaS)?	5	1	1	1	5

### PRE-BUILT RFP/RFI QUESTIONNAIRES

Standard questionnaires based on solution(s) that can be easily tailored / customized to your needs.

### UNIFIED PLATFORM

The platform organizes and manages the information using automation.

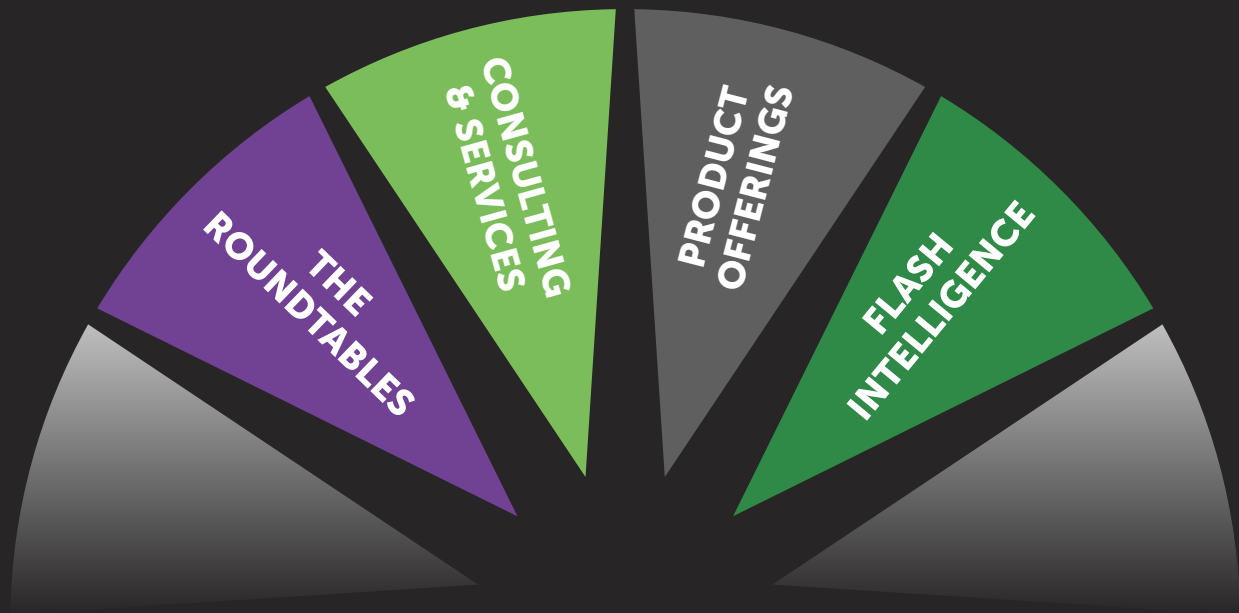


**BEACON STRATEGIES, LLC**

CONSULTING | ROUNDTABLES | PRODUCTS & SERVICES

## AS THE INDUSTRY CONTINUES TO EVOLVE, FIRMS ARE FACING INCREASING HEADWINDS

Chip Kispert founded Beacon Strategies, LLC in 2006 to help wealth management firms and solution providers meet these challenges with thought provoking roundtables, experienced consulting services, and next generation products and services. Since opening the Beacon doors, Chip and the Beacon team have become the central repository and bridge to the ever-evolving network of products and services available to wealth firms.



We're excited to share with you our suite of operational, educational, consulting and practice management product offerings designed to support your firm's growth goals and employee development.

To learn more about RFP Engineer  
and Beacon Strategies:

[Schedule a meeting with Chip](#)

