



Request for Statements of Interest: Investment Consulting Services

Issued by the Indigenous Peoples Resilience Fund

Introduction

The Indigenous Peoples Resilience Fund (IPRF) is an Indigenous-led, community-driven foundation supporting Indigenous communities across Canada. IPRF currently holds \$11.6 million as a long-term resilience fund and is moving towards a more permanent endowment. IPRF has set a fundraising goal of \$250 million by 2030. Guided by Indigenous worldviews, IPRF's Long-Term Resilience Fund emphasizes capital preservation, sustainable growth, and meaningful social impact.

IPRF is seeking proposals from qualified investment consulting firms to assist in developing and implementing a comprehensive investment strategy for its \$11.6 million endowment. IPRF is committed to impact and responsible investing, and the selected consultant will play a critical role in helping us structure our portfolio, establish clear investment guidelines, and identify values-aligned asset managers.

The selected consultant will be expected to develop an investment policy statement (IPS) provide strategic asset allocation guidance, conduct management selection and due diligence, and ensure IPRF's investments align with our financial and mission-driven objectives.

IPRF's guiding principles and values:

- **Nimbleness:** *Simplified, efficient fund flows.*
- **Adaptive:** *Evolving as conditions and needs change.*
- **Collaborative:** *Engaging partners meaningfully.*
- **Transparency:** *Open and clear decision-making.*
- **Innovation and Scale:** *Leveraging innovations for broader impact.*
- **Community Safety:** *Promoting mental, spiritual, emotional, and physical safety.*

For more information about IPRF and our work, visit www.iprfund.ca.



Investment Approach

IPRF adopts an impact-first approach guided by the following principles:

- ***Investing in Indigenous Worldviews:*** Supporting Indigenous-led businesses, innovation, and community-focused ventures.
- ***Economic Reconciliation:*** Creating partnerships and opportunities that redress historic economic inequities.
- ***Seven-Generation Principle:*** Decision-making that considers the impact on future generations.
- ***Cultural Alignment:*** Reflecting on themes of land stewardship, food sovereignty, and traditional teachings in asset selection.

Scope of Services

The selected investment consultant will be responsible for:

- ***Investment Policy Development***
 - *Assisting in the refinement of IPRF's Investment Policy Statement (IPS), incorporating impact and social responsibility principles.*
 - *Advising on governance best practices related to investment oversight and decision-making.*
- ***Asset Allocation and Portfolio Construction***
 - *Recommending an asset mix that balances risk, return, liquidity, and mission alignment.*
 - *Providing guidance on portfolio diversification, risk management, and sustainable considerations.*
 - *Determine appropriate benchmarks.*
- ***Manager Selection and Due Diligence***
 - *Identifying and recommending investment managers that align with IPRF's impact investing and ESG criteria.*
 - *Conducting due diligence on managers, including performance analysis, sustainability integration, fees, and track record in responsible investing.*
- ***Impact and Responsible Investment Integration***
 - *Advising on best practices for responsible investment, ESG and SDG integration, and impact measurement.*
 - *Assisting in the development of exclusion criteria, positive screening, and engagement strategies.*



Statement of Interest Submission Requirements

Interested firms should submit a Statement of Interest addressing the following:

1. Overview

- a. *Background, history, and ownership structure.*
- b. *Experience working with Indigenous investors, foundations, endowments, and mission-driven investors.*
- c. *Key team members and their expertise in impact and responsible investing.*

2. Cultural Competence and Reconciliation

- a. *Describe your understanding of Indigenous culture, history, and Truth and Reconciliation in Canada.*
- b. *Describe reconciliation initiatives within your organization, including hiring and promoting Indigenous employees.*
- c. *Is your firm certified by the Canadian Council on Indigenous Business Partnership Accreditation for Indigenous Relations program?*

3. Investment Philosophy and Approach

- a. *Describe your firm's approach to responsible investing, ESG and SDG integration, and impact investing.*
- b. *Outline how you help clients develop investment beliefs and investment policies aligned with financial and mission objectives.*

4. Service Model and Capabilities

- a. *Detail your approach to asset allocation and risk management.*
- b. *Explain your process for identifying and evaluating impact-oriented managers.*
- c. *Provide examples of how you have advised clients on sustainable and impact investing and any thought leadership you have produced in this area.*

5. Fee Structure

- a. *Provide a detailed fee proposal, including any retainer fees, performance-based fees, or additional costs.*
- b. *Disclose any potential conflicts of interest related to manager selection and compensation.*

6. References

- a. *Provide at least three client references (preferably from Indigenous investors, foundations, or endowments with responsible investment mandates).*



Selection Criteria and Evaluation Process

Proposals will be evaluated based on the following criteria:

- *Alignment with IPRF's values, vision, and objectives.*
- *Experience and expertise in investment consulting for foundations and Indigenous investors.*
- *Demonstrated expertise in the areas of impact and responsible investing.*
- *Quality of investment philosophy, asset allocation strategy, and manager selection process.*
- *Robustness of performance monitoring and impact reporting capabilities.*
- *Fee structure and transparency.*
- *References and client satisfaction.*

Submission Deadline

- *We ask that all Statements of Interest be submitted by **June 10, 2025**.*
- *The deadline for questions is June 3, 2025*
- *Please signal your intent to respond to this Statement of Interest by June 3, 2025.*

Submission Instructions

Please submit your Statement of Interest, including all required documents, to: Natalia Caplin:
Natalia Caplin, Manager - Executive Office and Governance, IPRF: talia@iprfund.ca.

Subject Line: Statement of Interest for Investment Consulting Services

We look forward to collaborating with an investment consulting partner who shares our commitment to Indigenous resilience, economic reconciliation, social impact, and seven-generation stewardship.