

**UNIVERSITY OF HOUSTON SYSTEM  
BOARD OF REGENTS AGENDA**

**COMMITTEE:** Endowment Management Committee

**ITEM:** Approval is requested to delegate authority to the Chancellor to negotiate and execute a contract for an investment advisor for the University of Houston System Endowment and Non-Endowed Investments

**DATE PREVIOUSLY SUBMITTED:** NA

**SUMMARY:**

The System seeks approval to enter into a contract with an investment advisor to advise and assist the Committee and the System on all investment and related matters for the University of Houston System endowed and non-endowed assts. A request for proposal was issued for investment advisory services in May of 2025. An evaluation team comprised of System personnel independently evaluated the seven proposals received. Four firms were selected as finalist candidates based on the scoring. The finalist candidate firms provided virtual presentations, and the evaluation committee evaluated each firm, including client reference checks. Mr. Raymond Bartlett will discuss with the Committee the procurement process and recommended Investment Advisor.

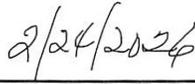
**SUPPORTING DOCUMENTATION:** none

**FISCAL NOTE:** \$2.4M for the five year term

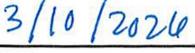
**RECOMMENDATION/  
ACTION REQUESTED:** Administration recommends approval of this item

**COMPONENT:** University of Houston System

  
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**SENIOR VICE CHANCELLOR** Raymond S. Bartlett

  
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**DATE**

  
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**CHANCELLOR** Renu Khator

  
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**DATE**