

From: **Adam Barney** <[opengovbookca@gmail.com](mailto:opengovbookca@gmail.com)>  
Date: Sunday, September 25, 2016  
Subject: FOIA Request | District Financial Data  
To: [wmccoy@smsd.org](mailto:wmccoy@smsd.org)

Dear William:

re: Sausalito Marin City

Under the California Public Records Act § 6250 et seq., I am kindly requesting to obtain electronic copies of public records that include the following records:

- The current investment/cash management portfolio of the school district (brokerage statement, bank statement, etc.);
- If the school district participates in any local government investment pool please either acknowledge such by including amounts and with which pool or in lieu of the answers please provide the most recent participant statement(s);
- If the school district is under contract with an outside investment firm(s), please kindly provide a copy of each of the contracts and the most recent invoice(s) from those firm(s);
- If the school district has gone through a recent RFP process (in last 5-years) for investment services please provide a copy of all responses to the RFP;
- Finally, the most recent, if any, presentation received from each outside investment firms that provide investment/financial services to the school district;

If there are any fees for copying these records, please inform me if the cost will exceed \$25.00. However, I would also like to request a waiver of all fees in that the disclosure of the requested information is in the public interest and will contribute significantly to the public's understanding of the scope of services being offered and provided to California public fund managers.

The California Public Records Act requires a response within ten(10) business days. If providing the records I am requesting will take longer, please reply back with non-binding guidance relating to when I might expect to be in receipt of the responsive documents.

If you deny any or all of this request, please cite each specific exemption you feel justifies the refusal to release the information and notify me of the appeal procedures available to me under the law.

Thank you for kindly for considering and complying with my request.

Sincerely,  
Adam

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Market Research Associate

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