

FAQ: Market RFP for Impact Wealth Management

Toniic and The ImPact

Many questions are answered in [the microsite](#) - please review it and this FAQ before submitting a new question.

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1. General & Submission Details

Q: What is the deadline for submitting the RFP response?

A: All final proposals must be submitted by email to RFP@toniic.com by midnight Greenwich Mean Time on November 20, 2026.

Q: Who is the primary point of contact for technical or procedural questions?

A: Please direct all inquiries to Adam Bendell at RFP@toniic.com. To ensure a fair process, do not contact individuals involved in the process directly.

Q: Is this a pooled procurement process? Will a mandate be awarded?

A: No. It is a comparative market survey of how wealth managers serve clients who want to align their capital with impact goals. The project respects each member's independent decision-making -it is not a procurement process or a collective mandate.

Q: What are the core capabilities required of respondents?

A: The RFP is aimed at impact-capable wealth managers/wealth advisors globally. This spans from specialists to full service. Response is open to any team or regional office at any

organization. We encourage separate responses from different regions at the same organization if capabilities differ. The questions in the RFP are aimed at wealth managers, not asset managers, but organizations will make their own assessment about their fit in deciding whether to respond. Everything an organization needs to respond can be found on [the microsite](#) in the section materials for respondents.

Q: Is there a relationship between this process and Values Advisor?

A: Toniic partners with Values Advisor, and Toniic members have access to the Values Advisor database. Values Advisor has had a US focus and this Market RFP is global, invites additional respondents, and updates the questions to reflect market changes since Values Advisor was launched. Information from Values Advisor will not be incorporated into the Toniic/The ImPact database at this time. That said, Lisa Renstrom, co-founder of Values Advisor, is also co-chair of the Toniic Wealth Management Working Group, and we are coordinating closely.

Q: Will there be a mechanism for periodic updates?

A: Before committing to updates, we want to complete initial data collection. We are aware that this type of information becomes stale and requires periodic updating. We will clearly state the date the information was provided and that users should confirm accuracy prior to reliance.

2. Logistical Questions

Q: What if my organization does not allow me to open macro-enabled Excel sheets?

A: The Excel sheet contains one macro to enable "select all that apply" where applicable. You can choose to disable macros when you open the sheet; it just makes the data entry a bit more tedious.

If you have enabled macros when opening the sheet, select all that apply from the dropdown in column C and leave column H blank. If you have disabled macros when opening the sheet, you will not be able to enter multiple values in column C. In that case, type all the values that apply (selecting only from dropdown values in column C) in column H and leave column C blank.

Q: What is the latest version of the Excel Questionnaire?

A: The latest version of the Excel Questionnaire is labeled version 1.1. Please respond using that version, which corrects data validation problems in the original version. The version

number is labeled both in the file name and at the top of each sheet, and the current version is available for download from [the microsite](#).