



## TERMS OF REFERENCE

### Brand Architecture and Institutional Identity

#### 1. Background

**CIFI** is an investment platform that offers integrated financial solutions to private developers and investors in sustainable, high-impact infrastructure in Latin America and the Caribbean. As part of its institutional growth and the consolidation of its portfolio of solutions, CIFI has strengthened its corporate structure through the development or acquisition of specialized entities, including CIFI Asset Management and Finenge. This organizational evolution makes it necessary to reinforce and harmonize the institutional identity of CIFI and these two subsidiaries, ensuring a clear and coherent brand architecture that properly reflects the roles, capabilities, and value propositions of each entity.

#### **About CIFI**

CIFI offers a comprehensive range of financial services (advisory, structuring, financing, syndication, and asset management) designed to support the entire life cycle of energy and infrastructure projects in Latin America and the Caribbean.

[www.cifi.com](http://www.cifi.com)

#### **About CIFI Asset Management**

CIFI Asset Management structures and manages investment vehicles in sustainable infrastructure, connecting institutional capital with responsible investment opportunities and risk-adjusted returns in Latin America and the Caribbean.

[www.cifiam.com](http://www.cifiam.com) (new website launch planned for Q2 2026)

#### **About Finenge**

Finenge is a **financial advisory** firm specializing in long-term financing for infrastructure projects, supporting its clients throughout the entire project cycle, from analysis and structuring to negotiation and financial close.

[www.finenge.com](http://www.finenge.com)

#### 2. Overall objective

Design and develop a coherent, clear, and consistent **institutional brand identity for CIFI and its subsidiaries CIFI Asset Management and Finenge**, which properly reflects the positioning, capabilities, and value proposition of each entity, and strengthens the coherence of the group as a whole.



This work includes defining a **clear brand architecture** that establishes the relationship between the parent brand and its subsidiary brands, as well as developing a **comprehensive identity (strategic, verbal, and visual)** that translates into effective communication guidelines and materials, aligned with institutional objectives and industry best practices. All of this must be carried out without substantially modifying CIFI's institutional logo, prioritizing clarity, differentiation among entities, consistency in brand use, and the practical applicability of the resulting guidelines across the organization's various touchpoints.

### 3. Scope of work

The provider must deliver:

#### 3.1. Brand diagnosis and strategy (Phase 1)

Assessment of the current brands of CIFI, CIFI Asset Management, and Finenge.

Proposed brand architecture (parent brand / sub-brand).

Definition of positioning and personality for each of the three entities.

#### 3.2. Verbal identity in English (Phase 2)

Institutional tagline for each entity.

Tone of voice for each entity.

Key messages for each entity (value proposition, main benefits, boilerplate, among others).

Brand narrative for each entity (origin, purpose, values, mission, among others).

#### 3.3 Visual identity (Phase 3)

Logos for CIFI, CIFI Asset Management, and Finenge (design or update), including sizes, clear space, placement, colors depending on background, correct/incorrect uses, etc.

Color palettes, typography, photography, and graphic elements (iconography, patterns, shapes, and styles).

Co-branding and visual relationship among the brands.

#### 3.4. Brand guidelines (Phase 4)

Unified document in English with specific sections for each subsidiary.

Including all verbal and visual identity elements.

Rules for the use of CIFI's elements and those of its subsidiaries.

Design applications for each entity, including, among others: business cards, email signatures, corporate folders, virtual call backgrounds, roll-up banners, PowerPoint templates, letterheads, digital covers, bios, and sample posts for CIFI's social media channels ([LinkedIn](#), [Instagram](#), [X](#), and [YouTube](#)).



#### 4. Expected deliverables

Brand diagnosis and brand architecture document.

Verbal identity proposal.

Visual identity proposal.

Complete brand guidelines in editable format and PDF (.ai or similar).

#### 5. Implementation period

The work must be completed within four (04) months, counted from the date of contract signature.

#### 6. Selection criteria

The contractor must meet the following requirements, which will be evaluated based on documented evidence included in the proposal:

Criterion	Description	Evaluation method	Measurement
<b>Pass/Fail criteria</b>			
Legal incorporation of the company	The company must be legally incorporated and authorized to operate, in accordance with the legislation of its country of origin, and have the legal capacity to enter into contracts.	Copy of the certificate/articles of incorporation, commercial registry, or equivalent document.	Meets / Does not meet
Work portfolio	Submission of a portfolio of relevant projects demonstrating conceptual quality, visual coherence, creativity, and alignment with the project's objectives.	Portfolio attached.	Meets / Does not meet
Team CVs	Submission of CVs for the key team assigned to the project, indicating role, years of experience, and participation in similar projects.	CVs attached.	Meets / Does not meet
<b>Technical criteria</b>			
Experience and strategic capabilities in institutional branding	Proven experience of the provider in institutional branding projects, including development of brand architecture, positioning, verbal identity (taglines, key messages, and boilerplate), and its	Portfolio of relevant projects, case descriptions, and examples of deliverables.	Number of relevant projects Project quality (High/Medium/Low)

	application in communication materials, demonstrating strategic coherence and appropriateness to the institutional context.		
International and sector experience	Demonstrable experience in branding projects for comparable financial, multilateral, or corporate organizations. Geographic and language diversity will be valued, with special focus on English, Spanish, and Portuguese.	List of projects indicating client, country, language, and scope.	Number of sector projects Number of countries where work has been performed English (Yes/No) Spanish (Yes/No) Portuguese (Yes/No)
Technical and strategic capabilities in design and brand verbal identity	The team's ability to translate brand strategy into coherent visual and verbal identity solutions, including graphic systems, brand architecture, value propositions, key messages, and institutional copywriting, demonstrating conceptual clarity and strategic consistency.	Team CVs, visual and verbal samples, examples of value propositions, and explanation of the methodological approach.	Years of experience of key profiles Fit of profiles to the proposed roles
Proposed methodology and work approach	Quality and coherence of the proposed methodology, including phases, strategic approach, validation mechanisms, and articulation between visual and verbal components.	Technical proposal	Clarity of approach (High/Medium/Low)
Proposed schedule and work plan	Quality, coherence, and realism of the proposed schedule in relation to the scope, deliverables, and project validation phases.	Schedule and work plan included in the technical proposal.	Clarity of schedule (High/Medium/Low)
<b>Financial criterion</b>			
Financial proposal	Clarity, reasonableness, and coherence of the financial proposal in relation to the proposed scope, deliverables, and schedule.	Review of the financial proposal and cost breakdown table.	Total amount of the proposal

## 7. Technical and financial proposal

Interested parties must submit a proposal that includes:

- Legal incorporation documents



- Details of the methodological approach to carry out the project.
- Activity schedule.
- Itemized budget.
- Portfolio of similar projects delivered.
- CVs of team members

## 8. Payment terms

Payment will be made according to the following table:

Deliverable	% of total payment	Payment date
Brand diagnosis and brand architecture document	25%	Two (2) weeks after delivery of the product
Verbal identity proposal	25%	Two (2) weeks after delivery of the product
Visual identity proposal	25%	Two (2) weeks after delivery of the product
Complete brand guidelines in editable format and PDF (.ai or similar)	25%	Two (2) weeks after delivery of the product

## 9. Contact

Proposals must be submitted by **April 12, 2026 at 11:59 pm (UTC-5)** to [procurement@cifi.com](mailto:procurement@cifi.com).