

RFP #: RFP25-045 Tentative City Commission Meeting Date*: TBD

RFP Title: Investment Advisory Services # Notified: 389 # Downloaded: 12

of Responses Rec'd: 6 # of "No Bids": 0

For: Finance Department RFP Opening Date: JUNE 5, 2025
(Department)

POSTING OF RFP RECOMMENDATION/TABULATION: RFP Recommendations and Tabulations will be posted in the eBid System, IonWave, and will remain posted for 72 hours. Any person who may be adversely affected by the decision or intended decision shall file a notice of protest in writing within 72 hours of posting the notice of the decision or intended decision. The formal written protest shall be filed within ten (10) days after the date the notice of protest is filed. Failure to file a notice of protest or a formal written protest shall constitute a waiver of proceedings under this chapter. Section 120.57(3)(b), Florida Statutes, states that "The formal written protest shall state with particularity the facts and law upon which the protest is based." Saturdays, Sundays, state holidays, and days when the City is closed shall be excluded from the computation of the 72-hour time period provided. Filings shall be at the office of the Director of Procurement and Contracts, 1010 NE 3rd Avenue, Building C, Pompano Beach, FL 33060. Any person who files an action protesting an intended decision shall post with the City, at the time of filing the formal written protest, a protest bond, payable to the City of Pompano Beach, Florida, in an amount equal to one percent (1%) of the estimated value of the contract. Failure to submit the protest bond within the time allowed for filing a bond shall constitute a waiver of the right to protest. Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, or failure to post the protest bond or other security required by law within the time allowed for filing a bond shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.

(*) The Cone of Silence, as stated in the RFP, is in effect until the City Commission approves it. The City Commission meeting date stated above is tentative. Confirm with the Purchasing Agent of record for the actual date the Cone of Silence has concluded.

RECOMMENDATION TABULATION

The City of Pompano Beach, Florida, received six (6) proposals for RFP25-045 Investment Advisory Services, with the following results:

Proposer	Score	Ranking
PFM Asset Management (a division of U.S. Bancorp Asset Management, Inc.)	483.00	Highest Ranked
Insight Investment	442.00	2nd Highest Ranked
Public Trust Advisors, LLC	411.00	3rd Highest Ranked
Deep Blue Investment Advisors (Wertz York Capital Management Group, LLC)	382.25	4th Highest Ranked
Chandler Asset Management	382.00	5th Highest Ranked
PNC Capital Advisors (PNC Bank Financial Services)	326.00	6th Highest Ranked

Under Section 7 of the RFP, "the Evaluation Committee will recommend one Submitting Firm to the City Commissioners for the award and execution of a Service Agreement". All six proposers met all the criteria outlined in the bidding documents and were declared responsive and responsible.

The review of all proposals received confirmed that the six proposals meet all the requirements outlined in the RFP. PFM Asset Management (a division of U.S. Bancorp Asset Management, Inc.) is the highest-ranked proposer; therefore, it is recommended for an award.

By: Jeffrey English Date: 07/23/2025
(Purchasing Agent)

Criteria	Total Potential Points	CHANDLER ASSET MANAGEMENT	Deep Blue Investment Advisors (WERTZ YORK CAPITAL MANAGEMENT GROUP, LLC)	Insight Investment	PFM Asset Management (U.S. Bancorp Asset Management, Inc.)	PNC Capital Advisors (PNC Bank Financial Services)	Public Trust Adviso rs, LLC
6.2 Proposer's Expertise and Experience	30	22	24	30	28	15	18
6.3 Approach and Discipline	25	19	20	25	23	10	18
6.4 Accounting and Reporting	10	10	10	10	10	2	10
6.5 References	10	10	10	10	10	2	10
6.6 Cost	30	24	26.25	30	30	22.7	23.33
6.7 Local Business Program	5	0	0	0	0	5	0
Total	110	85.000	90.250	105.000	101.000	56.700	79.330
Rank		4	3	1	2	6	5

Evaluation Committee Member: Allison Feurtado

I confirm that I have reviewed the scores above and verified their accuracy

Signature: 

Date: 7/9/2025

Notes: _____

Criteria	Total Potential Points	CHANDLER ASSET MANAGEMENT	Deep Blue Investment Advisors (WERTZ YORK CAPITAL MANAGEMENT GROUP, LLC)	Insight Investment	PFM Asset Management (U.S. Bancorp Asset Management, Inc.)	PNC Capital Advisors (PNC Bank Financial Services)	Public Trust Adviso rs, LLC
6.2 Proposer's Expertise and Experience	30	10	5	25	30	15	20
6.3 Approach and Discipline	25	15	10	0	20	5	25
6.4 Accounting and Reporting	10	10	10	10	10	10	10
6.5 References	10	5	7	6	9	0	7
6.6 Cost	30	24	26.25	30	30	22.7	23.33
6.7 Local Business Program	5	0	0	0	0	5	0
Total	110	64.000	58.250	71.000	99.000	57.700	85.330
	Rank	4	5	3	1	6	2

Evaluation Committee Member: Darrel Thomas

I confirm that I have reviewed the scores above and verified their accuracy

Signature:  Date: 7/9/2025

Notes: _____

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Chandler Asset Management

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	10
6.3	Approach and Discipline	0-25	15
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	5
6.6	Cost	0-30	Provided by Purchasing
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	40 54

24

64 7/9/25

COMMENTS:

Darrel Thomas

Digitally signed by Darrel Thomas
Date: 2025.07.07 15:25:17 -04'00'

July 7, 2025

Darrel L. Thomas

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Deep Blue Investment Advisors

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	5
6.3	Approach and Discipline	0-25	10
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	7
6.6	Cost	0-30	Provided by Purchasing
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	32 58.25

26.25
7/9/25

COMMENTS:

Darrel Thomas

Digitally signed by Darrel Thomas
Date: 2025.07.07 15:24:05 -04'00'

July 7, 2025

Darrel L. Thomas

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Insight Investment

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	25
6.3	Approach and Discipline	0-25	0
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	6
6.6	Cost	0-30	Provided by Purchasing
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	41 71

30
7/5/25

COMMENTS:

Darrel Thomas Digitally signed by Darrel Thomas
Date: 2025.07.07 15:24:27 -04'00'

July 7, 2025

Darrel L. Thomas

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer PFM Asset Management

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	30
6.3	Approach and Discipline	0-25	20
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	9
6.6	Cost	0-30	Provided by Purchasing 30
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	69 99

(DP)
7/9/25

COMMENTS:

Darrel Thomas
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Date: 2025.07.07 15:24:51 -04'00'

July 7, 2025

Darrel L. Thomas

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer PNC Capital Advisors

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	15
6.3	Approach and Discipline	0-25	5
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	0
6.6	Cost	0-30	Provided by Purchasing 22.70
6.7	Local Business Program	0-5	Provided by Purchasing 5
TOTAL POINTS	TOTAL POINTS	0-110	30 / 52.70 57.70

COMMENTS:

Darrel
Thomas

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Darrel Thomas
Date: 2025.07.07
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July 7, 2025

Darrel L. Thomas

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Public Trust Advisors

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	20
6.3	Approach and Discipline	0-25	25
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	7
6.6	Cost	0-30	Provided by Purchasing
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	62 85.33

23.33
7/9/25

COMMENTS:

Darrel
Thomas

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Thomas
Date: 2025.07.07 15:27:20
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July 7, 2025

Darrel L. Thomas

Signature of Evaluator

Date

Printed Name

Criteria	Total Potential Points	CHANDLER ASSET MANAGEMENT	Deep Blue Investment Advisors (WERTZ YORK CAPITAL MANAGEMENT GROUP, LLC)	Insight Investment	PFM Asset Management (U.S. Bancorp Asset Management, Inc.)	PNC Capital Advisors (PNC Bank Financial Services)	Public Trust Adviso rs, LLC
6.2 Proposer's Expertise and Experience	30	24	20	26	27	24	24
6.3 Approach and Discipline	25	20	19	22	23	21	22
6.4 Accounting and Reporting	10	10	10	10	10	10	10
6.5 References	10	10	10	10	10	2	10
6.6 Cost	30	24	26.25	30	30	22.7	23.33
6.7 Local Business Program	5	0	0	0	0	5	0
Total	110	88.000	85.250	98.000	100.000	84.700	89.330
	Rank	4	5	2	1	6	3

Evaluation Committee Member: Joshua Watters

I confirm that I have reviewed the scores above and verified their accuracy

Signature: Joshua Watters

Date: 9 July 2025

Notes: _____

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Chandler Asset Mgt

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	20 24 28 24
6.3	Approach and Discipline	0-25	20
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	10(?)
6.6	Cost	0-30	20 24 24
6.7	Local Business Program	0-5	Provided by Purchasing 0
TOTAL POINTS	TOTAL POINTS	0-110	

88

COMMENTS:

4.3 - HAM model / tailored approach

6.2 42.5 B assets under mgt March 2025 / 100 cities (14 B)
 35 yrs / FL Exp. P.7 for list Bonds

6.4 Monthly statement / ~~online~~ / online platform

6.5 Florida references

6.6 cost First 50M 0.06 of 1.70
 2nd " 0.05 of 1.70
 3rd 100M 0.04 of 1.70

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Deep Blue

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	20
6.3	Approach and Discipline	0-25	19
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	10?
6.6	Cost	0-30	10 20-25
6.7	Local Business Program	0-5	Provided by Purchasing 0
TOTAL POINTS	TOTAL POINTS	0-110	85.25

COMMENTS:

6.2 15.5B Dec 2024 AUM / 25 yrs Exp / Bonds / Exp personal

6.3 structure approach / proactive / A portfolio / advice

6.4 Monthly / Quarterly reports.

6.5 Florida - sunrise / Panama City

6.6 0.04 of 1% - All assets

6.7

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Insight

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	26
6.3	Approach and Discipline	0-25	22
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	10
6.6	Cost	0-30	30
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	

98

\$799B.
799B AUM?COMMENTS:6.2 30 yr BNY / Deep Flexp. Sanford/Davie/Aventura ^{2025 Q1} \$164 B AUM

6.3 Risk averse / Diversification / Flowchart p 24

6.4 Good Educ. materials / Compliance / monthly/quarterly / strong ratings

6.5 Strong Sanford/Davie/Aventura

6.6 0.035 % of all assets v mgmt

✗

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer

PFM

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	20 27
6.3	Approach and Discipline	0-25	23
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	10
6.6	Cost	0-30	20 30
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	

100

0

COMMENTS:

Div of US Bancorp

FL - \$20B AUM

6.2 Provide FL Training / 8 local is - trained ~\$200B AUM p.14

6.3 Safety/Liquidity / Return → Prioritization

6.4 Daily/Monthly/Quarterly

6.5 Underwrite / BOE / Ground / Plantation

6.6 1st zoom = 0.04% Over \$200M 0.03%

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer

PNC

79.7

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	24
6.3	Approach and Discipline	0-25	21
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	8
6.6	Cost	0-30	22.70
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	

5

COMMENTS:

Total Avm = 43.43

6.2 14.6B / 81 Public entity PFs Same FL Exp

6.3 Opportunistic / Dynamic / Security Sel. / Team decisions

6.4 Advent APX Hyating - Online - no example

6.5 Weak to FL. St. MD. ~~MD~~ / Alabaster City Schools6.6 1st 100M 0.06% Next 50M 0.05% Over 150M 0.04%

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Public Trust

89.33

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	24
6.3	Approach and Discipline	0-25	22
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	10
6.6	Cost	0-30	10 23.33
6.7	Local Business Program	0-5	0 Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	

COMMENTS:

6.2 AUM ~\$100M total P 13 / solid ~~lean~~ approach / Familiar w/ FL laws / FL Exp. / long hist p.8

6.3 Principles: Safety / Liquidity / Compliance / Transparency / Yield

6.4 Monthly / Quarterly reports - active

6.5 Florida references.

6.6 0.25% - 0.50% depending on strategy

Signature of Evaluator

Date

Printed Name

Criteria	Total Potential Points	CHANDLER ASSET MANAGEMENT	Deep Blue Investment Advisors (WERTZ YORK CAPITAL MANAGEMENT GROUP, LLC)	Insight Investment	PFM Asset Management (U.S. Bancorp Asset Management, Inc.)	PNC Capital Advisors (PNC Bank Financial Services)	Public Trust Adviso rs, LLC
6.2 Proposer's Expertise and Experience	30	21	20	26	27	10	30
6.3 Approach and Discipline	25	23	22	20	25	15	25
6.4 Accounting and Reporting	10	10	9	9	10	5	10
6.5 References	10	8	10	5	9	1	10
6.6 Cost	30	24	26.25	30	30	22.7	23.33
6.7 Local Business Program	5	0	0	0	0	5	0
Total	110	86.000	87.250	90.000	101.000	58.700	98.330
	Rank	5	4	3	1	6	2

Evaluation Committee Member: Patricia White

I confirm that I have reviewed the scores above and verified their accuracy

Signature: _____

Date: _____

Notes: _____

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Chandler Asset Management

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	21
6.3	Approach and Discipline	0-25	23
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	8
6.6	Cost	0-30	24
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	86

COMMENTS:Exp

Approach

Accounting/reporting

References



July 9, 2025

Patricia White

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Deep Blue

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	20
6.3	Approach and Discipline	0-25	22
6.4	Accounting and Reporting	0-10	9
6.5	References	0-10	10
6.6	Cost	0-30	26.25
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	87.25

COMMENTS:Exp

Approach

Accounting/reporting

References



July 9, 2025

Patricia White

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Insight

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	26
6.3	Approach and Discipline	0-25	20
6.4	Accounting and Reporting	0-10	9
6.5	References	0-10	5
6.6	Cost	0-30	30
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	90

COMMENTS:Exp

Approach

Accounting/reporting

References



July 9, 2025

Patricia White

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer ^{PFM} _____

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	27
6.3	Approach and Discipline	0-25	25
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	9
6.6	Cost	0-30	30
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	101

COMMENTS:Exp

_____Approach

_____Accounting/reporting

_____References
_____

July 9, 2025

Patricia White

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer PNC

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	10
6.3	Approach and Discipline	0-25	15
6.4	Accounting and Reporting	0-10	5
6.5	References	0-10	1
6.6	Cost	0-30	22.70
6.7	Local Business Program	0-5	Provided by Purchasing 5
TOTAL POINTS	TOTAL POINTS	0-110	58.70

COMMENTS:Exp

Approach

Accounting/reporting

References



July 9, 2025

Patricia White

Signature of Evaluator

Date

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer Public Trust

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	30
6.3	Approach and Discipline	0-25	25
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	10
6.6	Cost	0-30	23.33
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	98.33

COMMENTS:Exp

Approach

Accounting/reporting

References



July 9, 2025

Patricia White

Signature of Evaluator

Date

Printed Name

Criteria	Total Potential Points	CHANDLER ASSET MANAGEMENT	Deep Blue Investment Advisors (WERTZ YORK CAPITAL MANAGEMENT GROUP, LLC)	Insight Investment	PFM Asset Management (U.S. Bancorp Asset Management, Inc.)	PNC Capital Advisors (PNC Bank Financial Services)	Public Trust Adviso rs, LLC
6.2 Proposer's Expertise and Experience	30	10	10	15	20	15	10
6.3 Approach and Discipline	25	10	10	15	12	10	10
6.4 Accounting and Reporting	10	10	10	10	10	10	10
6.5 References	10	5	5	8	10	5	5
6.6 Cost	30	24	26.25	30	30	22.7	23.33
6.7 Local Business Program	5	0	0	0	0	5	0
Total	110	59.000	61.250	78.000	82.000	67.700	58.330
	Rank	5	4	2	1	3	6

Evaluation Committee Member: Pete Chircut

I confirm that I have reviewed the scores above and verified their accuracy

Signature: 

Date: 7/9/2025

Notes: _____

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer: Chandler Asset Management

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	10
6.3	Approach and Discipline	0-25	10
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	5
6.6	Cost	0-30	20 24
6.7	Local Business Program	0-5	0
TOTAL POINTS	TOTAL POINTS	0-110	55

COMMENTS:

24



Signature of Evaluator

7/1-9/2025

Date

PETE CHTIRANT

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer: Deep Blue Investment Advisors

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	10
6.3	Approach and Discipline	0-25	10
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	5
6.6	Cost	0-30	15 26.25
6.7	Local Business Program	0-5	0
TOTAL POINTS	TOTAL POINTS	0-110	50

COMMENTS:

26.25



Signature of Evaluator

7/9/2025

Date

PETE CHIN ET

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer: Insight Investment

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	15
6.3	Approach and Discipline	0-25	15
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	8
6.6	Cost	0-30	10 30
6.7	Local Business Program	0-5	0
TOTAL POINTS	TOTAL POINTS	0-110	58

COMMENTS:

30. BPs



Signature of Evaluator



Date



Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer: PFM Asset Management

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	20
6.3	Approach and Discipline	0-25	12
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	10
6.6	Cost	0-30	10 30
6.7	Local Business Program	0-5	0
TOTAL POINTS	TOTAL POINTS	0-110	62

COMMENTS:

30 Pts



Signature of Evaluator

7/9/2020

Date

Pete Chircut

Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer: PNC Capital Advisors

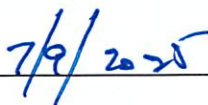
SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	15
6.3	Approach and Discipline	0-25	10
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	5
6.6	Cost	0-30	15 22.70
6.7	Local Business Program	0-5	5
TOTAL POINTS	TOTAL POINTS	0-110	60

COMMENTS:

22.70



Signature of Evaluator



Date



Printed Name

EVALUATION CRITERIA

RFP25-045

Investment Advisory Services

Proposer: Public Trust Advisors, LLC

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE
6.2	Proposer's Expertise and Experience	0-30	10
6.3	Approach and Discipline	0-25	10
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	5
6.6	Cost	0-30	20 23.33
6.7	Local Business Program	0-5	0
TOTAL POINTS	TOTAL POINTS	0-110	55

COMMENTS:

23.33



Signature of Evaluator

7/9/2025

Date

PETE CHIRAW

Printed Name