

# Procurement and Contracts Department Mary Rivero, Director

mary.rivero@copbfl.com

RFP #:	RFP25-045	Tentative City Commission Meeting Date*:	ion <u>TBD</u>		
RFP Title:	Investment Advisory Services	# Notified:	389	# Downloaded:_	12
		# of Responses Rec'd:	6	# of "No Bids": _	0
For:	Finance Department (Department)	RFP Opening Date:	JUNE 5, 2025		

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.

(\*) 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	999	Score	Ranking
PFM Asset Management (a division of U.S. Bancorp Asset Management, Inc.)	ALC: NO.	483.00	Highest Ranked
Insight Investment	ili.	442.00	2nd Highest Ranked
Public Trust Advisors, LLC	W.	411.00	3rd Highest Ranked
Deep Blue Investment Advisors (Wertz York Capital Management Group, LLC)		382.25	4th Highest Ranked
Chandler Asset Management	1. A	382.00	5th Highest Ranked
PNC Capital Advisors (PNC Bank Financial Services)	W	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

-val	uation	Committee	Member:

Allison Feurtado

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

	20	0
Signature	Me	face

Date: 7/9/2025

:			

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			<b>随 我们们也是是此种的一种的现在分</b>				if Element
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: _	Daruf Thurs	Date: 7/9/2015	
Notes: _			
_			
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### 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 Purd	hasing 24
6.7	Local Business Program	0-5	Provided by Purchasing	
TOTAL POINTS	TOTAL POINTS	0-110	40 \$4	B 15
			(64)	@ Jalus

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

July 7, 2025

Darrel L. Thomas

Signature of Evaluator

**Date** 

### RFP25-045

## **Investment Advisory Services**

# Proposer Deep Blue Investment Advisors

6.7	Local Business Program	0-5	Provided by Purchasing	
6.7	Local Business Program	0-5		
6.7	Local Business Program	0-5	Provided by	
6.6	Cost	0-30	Provided by Purd	hasing 24,25
6.5	References	0-10	7	
6.4	Accounting and Reporting	0-10	10	
6.3	Approach and Discipline	0-25	10	
6.2	Proposer's Expertise and Experience	0-30	5	
SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE	

COMMENTS:

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

July 7, 2025

Darrel L. Thomas

Signature of Evaluator

Date

### RFP25-045

# **Investment Advisory Services**

Proposer	Insight	Investment
LIODOSCI		

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 Purd	hasing 30
6.7	Local Business Program	0-5	Provided by Purchasing	
TOTAL POINTS	TOTAL POINTS	0-110	41 71	100 1512

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

### 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 Pu	rchasing 30
6.7	Local Business Program	0-5	Provided by Purchasing	
TOTAL POINTS	TOTAL POINTS	0-110	6g 99	
				7/9/25

COMMENTS:

Darrel Thomas Date: 2025.07.07 15:24:51

July 7, 2025

Darrel L. Thomas

Signature of Evaluator

Date

### 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 Purd	hasing	22.70
6.7	Local Business Program	0-5	Provided by Purchasing	5	
TOTAL POINTS	TOTAL POINTS	0-110	30 52.76	8	(

**COMMENTS:** 

Darrel Thomas Digitally signed by Darrel Thomas Date: 2025.07.07 15:20:16 -04'00'

July 7, 2025

Darrel L. Thomas

Signature of Evaluator

**Date** 

### 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 Purd	hasing $23.33$
6.7	Local Business Program	0-5	Provided by Purchasing	
TOTAL POINTS	TOTAL POINTS	0-110	62 85.33	B Jal 25
			_	7/9/23

COMMENTS:		
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Darrel

Digitally signed by Darrel Thomas

Thomas Date: 20

Date: 2025.07.07 15:27:20 -04'00'

July 7, 2025

Darrel L. Thomas

Signature of Evaluator

Date

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							S MARKET STATE
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: Sum fratto	Date: 9 July 2025
Notes:	

### RFP25-045

# **Investment Advisory Services**

Proposer Chandler Asset light

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE	
6.2	Proposer's Expertise and Experience	0-30	1002-201 C	824
6.3	Approach and Discipline	0-25	20	
6.4	Accounting and Reporting	0-10	10	
6.5	References	0-10	(0(7)	10001 100
6.6	Cost	0-30	201 201	24
6.7	Local Business Program	0-5	Provided by Purchasing	0
TOTAL POINTS	TOTAL POINTS	0-110		

88

# **COMMENTS:**

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100 otces (14B) Bouls

### 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	to	
6.5	References	0-10	107	
6.6	Cost	0-30	100 2Ce-2	5
6.7	Local Business Program	0-5	Provided by Purchasing	0
TOTAL POINTS	TOTAL POINTS	0-110		85.25

COMMENTS:	
62 15.5B Dec 2024 AVM / 25 yes EXP	(Bonds / Exp personal
6.3 Structure approach practive / D portfolio / advice	
C.4 Monthly auasterly rents.	
6.5 FLORIDA - SUNTISE (Paname City &	
6.4 0.04 & 190 - All assets	
4.7	

Signature of Evaluator

Date

### RFP25-045

# **Investment Advisory Services**

Proposer (NS shot

TOTAL POINTS	TOTAL POINTS	0-110	
6.7	Local Business Program	0-5	Provided by Purchasing
6.6	Cost	0-30	<b>30</b>
6.5	References	0-10	10
6.4	Accounting and Reporting	0-10	10
6.3	Approach and Discipline	0-25	22
6.2	Proposer's Expertise and Experience	0-30	260
SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE

\$799 B.

COMMENTS:
U.Z 30 ye BNY Beep Flexp. Sward Davie Aventra F164 BAUM
4.3 Risk averse Diversification Flowchart p 24
6.4 God Educ materials (Comphanic monthly/avakely Strong regarty
6.5 On Strong Sanfor Davie Wentern
6.6 0.035 % of allassets ungt

### RFP25-045

## **Investment Advisory Services**

Proposer PFM

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE	100
6.2	Proposer's Expertise and Experience	0-30	Car 27	]
6.3	Approach and Discipline	0-25	23	
6.4	Accounting and Reporting	0-10	10	
6.5	References	0-10	(36)	
6.6	Cost	0-30	<b>100</b> 30	
6.7	Local Business Program	0-5	Provided by Purchasing	O
TOTAL POINTS	TOTAL POINTS	0-110		

COMMENTS:

Dis & Sharp Fr. Training & Locals is Frank retroop from p. 14

a. 5 Safety / lignisty / Puton of Peronneadin

b. 4 Daily Marthly Caracterly

b. 5 Laudenbale / Brown of Education

b. 6 1st 700m = 0.0478 Over Frank 0.03078

Signature of Evaluator

Date

### RFP25-045

# **Investment Advisory Services**

	PNC
Proposer_	TNC

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	100 Z1
6.4	Accounting and Reporting	0-10	10
6.5	References	0-10	Bea 2
6.6	Cost	0-30	201 22.70
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	

COM	MENTS: 14,4B/8	What AUM	=43.4B				
6.2	14.4B/8	1 Public entry	PF.	Some	FR EX	ρ	
	Opportunistic/I						
	Advent APX						
	Weak to Fr.				<b>Y</b>		
6.4	15 100M	0.0670	rext \$	MO	0.05%	Over 150M	0,04%

### RFP25-045

## **Investment Advisory Services**

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Proposer_	Tub	uc	(aus7

89.33

SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE	
6.2	Proposer's Expertise and Experience	0-30	24	1
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	a good	23.33
6.7	Local Business Program	0-5	Provided by Purchasing	0
TOTAL POINTS	TOTAL POINTS	0-110		

COMMENTS:

4.7 AUM N 100M fold P 13 Shillow approved

4.3 Pensulus: Sfety higher by language Transporting yield

4.4 Madhy Overley year-alia

4.5 Monda references.

4.4 0.25 90 — 0.590 depending on strategy

Signature of Evaluator

Date

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 Signature:	ne scores above and verified their accuracy	Date: 7/8/2025	
Notes: _			
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### RFP25-045

# **Investment Advisory Services**

Proposer	Chandler Asset Management
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Signature of Evaluator

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

# Exp Approach Accounting/reporting References July 9, 2025 Patricia White

Date

### RFP25-045

### **Investment Advisory Services**

Proposer	Deep Blue	
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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

# Exp Approach Accounting/reporting References July 9, 2025 Patricia White

Signature of Evaluator

Date

### RFP25-045

# **Investment Advisory Services**

Insight		
	Insight	Insight

Signature of Evaluator

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

# Exp Approach Accounting/reporting References July 9, 2025 Patricia White

Date

### RFP25-045

# **Investment Advisory Services**

Proposer	PFM			
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Signature of Evaluator

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

# Exp Approach Accounting/reporting References July 9, 2025 Patricia White

Date

### RFP25-045

# **Investment Advisory Services**

Proposer PNC	
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TOTAL POINTS	TOTAL POINTS	0-110	58,70	
6.7	Local Business Program	0-5	Provided by Purchasing	5
6.6	Cost	0-30	22.70	
6.5	References	0-10	1	
6.4	Accounting and Reporting	0-10	5	
6.3	Approach and Discipline	0-25	15	
6.2	Proposer's Expertise and Experience	0-30	10	
SECTION NUMBER	SECTION DESCRIPTION	POINTS	SCORE	

# Exp Approach Accounting/reporting References July 9, 2025 Patricia White

Signature of Evaluator

Date

### RFP25-045

## **Investment Advisory Services**

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	53.33
6.7	Local Business Program	0-5	Provided by Purchasing
TOTAL POINTS	TOTAL POINTS	0-110	98.33

# Exp Approach Accounting/reporting References July 9, 2025 Patricia White

Signature of Evaluator

Date

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							HE WORKS WAS A
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 Chircu	Evaluat	ion Com	mittee I	Member:	Pete	Chircu
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I confirm that I have reviewed the scores above an	d verified	their accurac	v
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Signature:	Date:	7	191	12025
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Notes:	
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### 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	3
6.6	Cost	0-30	24
6.7	Local Business Program	0-5	0
TOTAL POINTS	TOTAL POINTS	0-110	22

### COMMENTS:

24

7/-9/2020 Pete CHIRCUT

Date Printed Name

Signature of Evaluator

### 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	+= 26.25
6.7	Local Business Program	0-5	0
TOTAL POINTS	TOTAL POINTS	0-110	50

**COMMENTS:** 

26.25

7/9/2005 PETE CHINEU.

Signature of Evaluator

### 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	<del>10</del> 30
6.7	Local Business Program	0-5	0
TOTAL POINTS	TOTAL POINTS	0-110	58

### **COMMENTS:**

30. BPs

Signature of Evaluator

Date

### 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	15
6.6	Cost	0-30	<del></del>
6.7	Local Business Program	0-5	0
TOTAL POINTS	TOTAL POINTS	0-110	62

# **COMMENTS:**

30 PAS

Signature of Evaluator

Date

**Printed Name** 

7/9/202 PETE CHIR CUI

### 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** 

7/4/2000 PETE CHIPCET

### 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	1
6.6	Cost	0-30	23.33
6.7	Local Business Program	0-5	0
TOTAL POINTS	TOTAL POINTS	0-110	55

### **COMMENTS:**

23.33

Signature of Evaluator

Date