VEND	OR NAME: <u>CHANDLE</u>	R ASSET MANAGEMENT	Γ, INC			
		<u>Criteria</u>		<u>Point</u> Range	Score	
A	Experience and Expertise The firm's personnel relemanaging similar local governous and qualification individuals assigned to this a	overnment funds, and to on of the investment	the experience,	0-30	23	
В	Approach and Discipline Investment philosophy and s performance. Ability to provi services. Understanding of a and ability to provide these s	ide necessary portfolio ac the scope of services requ	counting	0-25	25	
С	References			0-10	10	
D	Accounting and Reporting			0-10	10	FD
E	Cost The firm providing the lowest p points. Firms should utilize th portfolio market values as of Ju to submit. Points will be awarde	ne City's overall combined une 30, 2013 in determining	(cash and core) bid proposal price	0-25	<u> 1813</u>	ED
	25 – [25 points X (total cost – lo	west total cost) / lowest total	cost]			
	Note: If the result is a negative	number, the score assigned	will be 0			
	Example: Proposal 1: \$100,000	Proposal, 2: \$130,000				
	Proposal 1 being the lowest, wo	ould achieve a score of 25 pc	pints			
	Proposal 2 would achieve a scc 25 – [25 X (\$130,000 – \$100,00		as follows:			,
	Sub-Total*			0-100	2581	t70
*0-5%	Tier1/Tier2 Local Business v	vill be calculated on comb	ined scoring totals	s of each o	company.	
•	Total*					
Comm	nents sufervolve opprised	is not many flor	stuil algi	longer	4	
N. Kr	1 .	12/11/2018	FR IF	ETA DIAM/	ANTI	
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VEND	OOR NAME:INSIGHT NORTH AMERICA L	LC		
	<u>Criteria</u>		<u>Point</u> Range	Score
Α	Experience and Expertise The firm's personnel relevant experience managing similar local government funds, resources and qualification of the investment individuals assigned to this account	and the experience,	0-30	27
В	Approach and Discipline Investment philosophy and strategy and demons performance. Ability to provide necessary portformations. Understanding of the scope of services and ability to provide these services	olio accounting	0-25	25
С	References		0-10	
D	Accounting and Reporting		0-10	10 2225 DD
E	Cost The firm providing the lowest price to the City will recpoints. Firms should utilize the City's overall comportfolio market values as of June 30, 2013 in detern to submit. Points will be awarded to other proposers in	bined (cash and core) nining bid proposal price	0-25	2625 DE
	25 - [25 points X (total cost - lowest total cost) / lower	st total cost]		
	Note: If the result is a negative number, the score ass	igned will be 0		
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000	0		
	Proposal 1 being the lowest, would achieve a score of	f 25 points		
	Proposal 2 would achieve a score of 17.5 points, calcolor 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5			
	Sub-Total*		0-100	9497 ED
*0-5%	Tier1/Tier2 Local Business will be calculated on	combined scoring totals	of each c	ompany.
	Total*			
by	Tordo elients Currently world		Hore	
A	12/11/2018	V	TA DIAMA	NTI
Signat	ure of Evaluator Date	Print	ed Name	

VEND	OOR NAME:PFM ASSET MANAGEMENT L	LC		
	<u>Criteria</u>		<u>Point</u> Range	Score
A	Experience and Expertise The firm's personnel relevant experience a managing similar local government funds, a resources and qualification of the investment individuals assigned to this account	nd the experience,	0-30	_30
В	Approach and Discipline Investment philosophy and strategy and demonst performance. Ability to provide necessary portfolioservices. Understanding of the scope of services and ability to provide these services	io accounting	0-25	<u>25</u>
С	References		0-10	10
D	Accounting and Reporting		0-10	10
E	Cost The firm providing the lowest price to the City will rece points. Firms should utilize the City's overall comb portfolio market values as of June 30, 2013 in determi to submit. Points will be awarded to other proposers in	nined (cash and core) ning bid proposal price	0-25	\$3 ED
	25 – [25 points X (total cost – lowest total cost) / lowest	t total cost]		
	Note: If the result is a negative number, the score assign	gned will be 0		
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000			
	Proposal 1 being the lowest, would achieve a score of 2	25 points		
	Proposal 2 would achieve a score of 17.5 points, calcul 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 pc			
	Sub-Total*		0-100	75 78 ED
*0-5%	Tier1/Tier2 Local Business will be calculated on c	ombined scoring total	s of each	company.
	Total*			
Comm	nents Very experienced, highlast g surance repuisements concerns	puro out of all	often	companites_
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Signat	ture of Evaluator Date	Print	ed Name	

VEND	OR NAME:PACIFIC INV	ESTMENT MANAGEM	ENT COMPANY	LLC		
		<u>Criteria</u>		<u>Point</u> Range	Score	
A	Experience and Expertise The firm's personnel releval managing similar local gove resources and qualification individuals assigned to this according	ernment funds, and of the investment	the experience,	0-30	25	
В	Approach and Discipline Investment philosophy and stra performance. Ability to provide services. Understanding of the and ability to provide these ser	e necessary portfolio ac e scope of services requ	counting	0-25	<u>25</u>	
С	References			0-10	0	
D	Accounting and Reporting			0-10	10	
E	Cost The firm providing the lowest price points. Firms should utilize the portfolio market values as of June to submit. Points will be awarded	City's overall combined a 30, 2013 in determining	(cash and core) bid proposal price	0-25	250	ED
	25 - [25 points X (total cost - lower	est total cost) / lowest total	cost]			
	Note: If the result is a negative nur	mber, the score assigned	will be 0			
	Example: Proposal 1: \$100,000 Pr	roposal, 2: \$130,000				
	Proposal 1 being the lowest, would	d achieve a score of 25 pc	ints			
	Proposal 2 would achieve a score 25 – [25 X (\$130,000 – \$100,000)		as follows:			
	Sub-Total*			0-100	\$560	EE
*0-5%	Tier1/Tier2 Local Business will	be calculated on comb	ned scoring totals	s of each c	ompany.	
	Total*					
Comm	te lity's amoust	et this reference	e sheet inter	101 kc	volvelogist	nce
X	<u> </u>	12/11/2018	ERJE	TA DIAMA	NTI	_
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VEND	OR NAME: _	PUBLIC TRUST ADVISORS LLC	u .				
		<u>Criteria</u>	= = =	<u>Point</u> Range	Score		
Α	The firm's managing sresources	and Expertise personnel relevant experience and similar local government funds, and and qualification of the investment ssigned to this account	the experience,	0-30	27		
В	Investment performance services. Ur	nd Discipline chilosophy and strategy and demonstrate c. Ability to provide necessary portfolio a nderstanding of the scope of services reco provide these services	ccounting	0-25	25		
С	References			0-10	0		
D	Accounting	and Reporting		0-10	10		
E	points. Firms portfolio mark	iding the lowest price to the City will receive should utilize the City's overall combined et values as of June 30, 2013 in determining ints will be awarded to other proposers in the	d (cash and core) g bid proposal price	0-25	16	10	ED
	25 – [25 point	s X (total cost – lowest total cost) / lowest total	al cost]				
	Note: If the re	sult is a negative number, the score assigned	d will be 0				
	Example: Pro	posal 1: \$100,000 Proposal, 2: \$130,000					
	Proposal 1 be	ing the lowest, would achieve a score of 25 p	ooints				
		ould achieve a score of 17.5 points, calculated 30,000 – \$100,000) / \$100,000] = 17.5 points			09	Ó	
	Sub-Total*			0-100	38	XI.	ED
0-5%	Tier1/Tier2 L	ocal Business will be calculated on com	oined scoring total	s of each c	ompany.		
	Total*						
	nents Not woller fr	very knowledgeoble of the	City's mi	tempso	John	7	
11							
X	S \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	12/11/2018	_ ERJE	TA DIAMA	NTI		
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VEND	OR NAME:SAWGRASS ASSET MANAGEMENT		
	<u>Criteria</u>	<u>Point</u> Range	Score
Α	Experience and Expertise The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account	0-30	23
В	Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services	0-25	25
С	References	0-10	10
D	Accounting and Reporting	0-10	10
E	Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner:	0-25	18 SI ED
	25 – [25 points X (total cost – lowest total cost) / lowest total cost]		
	Note: If the result is a negative number, the score assigned will be 0		
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000		
	Proposal 1 being the lowest, would achieve a score of 25 points		
	Proposal 2 would achieve a score of 17.5 points, calculated as follows: 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points		
	Sub-Total*	0-100	89 €D
*0-5%	Tier1/Tier2 Local Business will be calculated on combined scoring totals	s of each o	company.
	Total*		
Comm	dipendent from, 100% emprayer onned	u sands	the opposed
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Signal	ure of Evaluator Date Print	ed Name	

VEND	OR NAME:	VICTORY CAP	PITAL MANAGEMEN	IT INC			
		<u>C</u>	riteria		<u>Point</u> Range	<u>Score</u>	
Α	managing sim	ersonnel relevan nilar local goveri	t experience and nment funds, and of the investment unt	the experience,	0-30	23	
В	performance. A services. Under	losophy and strate Ability to provide r	egy and demonstrate necessary portfolio a scope of services rec ces	ccounting	0-25	25	
С	References				0-10	(0)	
D	Accounting ar	nd Reporting			0-10	10	
E	points. Firms st portfolio market	hould utilize the C values as of June 3	o the City will receive ity's overall combined to the combined	d (cash and core) g bid proposal price	0-25	\$ 10	ED
	25 - [25 points X	⟨ (total cost – lowest)	total cost) / lowest total	al cost]			
	Note: If the result	t is a negative numb	per, the score assigned	d will be 0			
	Example: Propos	sal 1: \$100,000 Prop	oosal, 2: \$130,000				
	Proposal 1 being	the lowest, would a	achieve a score of 25 p	ooints			
			17.5 points, calculate [100,000] = 17.5 points				
	Sub-Total*				0-100	73 7	8 ED
*0-5%	Tier1/Tier2 Loc	al Business will be	e calculated on com	oined scoring total	s of each o	company.	
	Total*						
Comn	A STATE OF THE PARTY OF THE PAR	Aug co.	Jension Syste	u, u alvere	expe	Huces	
Citi		olid not	andre any	Le Commen	oletion	s for the	
1	A	The control of	12/11/2018	_ ERJE	TA DIAMA	ANTI	
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VEND	OR NAME: WELLS CAPITAL MANAGEMENT_			
	<u>Criteria</u>	<u>Point</u> Range	Score	
Α	Experience and Expertise The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account	0-30	30	
В	Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services	0-25	25	
С	References	0-10	10	
D	Accounting and Reporting	0-10	10	FO
E	Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner:	0-25	7 10	
	25 – [25 points X (total cost – lowest total cost) / lowest total cost]			
	Note: If the result is a negative number, the score assigned will be 0			
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000			
	Proposal 1 being the lowest, would achieve a score of 25 points			
	Proposal 2 would achieve a score of 17.5 points, calculated as follows: 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points		*	
	Sub-Total*	0-100	20 ST.	0
*0-5%	Tier1/Tier2 Local Business will be calculated on combined scoring totals	of each o	ompany.	
	Total*			
deo	team has on extensive experience, con extensive experience, experience, con extensive experience, experience	Mot	les e (Let Let
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VEND	ORNAME: Chandle Asset Management	-	
	<u>Criteria</u>	Point Range	Score
Α	Experience and Expertise The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account	0-30	23
В	Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services	0-25	25
С	References	0-10	10
D	Accounting and Reporting	0-10	0
Е	Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner:	0-25	213 AT
	25 – [25 points X (total cost – lowest total cost) / lowest total cost]		
	Note: If the result is a negative number, the score assigned will be 0		
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000		
	Proposal 1 being the lowest, would achieve a score of 25 points		
	Proposal 2 would achieve a score of 17.5 points, calculated as follows: 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points		
	Sub-Total*	0-100	77 8 AT
*0-5%	Tier1/Tier2 Local Business will be calculated on combined scoring totals	s of each o	company.
	Total*		2 8 HO
No-	smaller from compared to some systaff was shorter than some of the		the other next policy. Tenure of respondents
Signa	ture of Evaluator Date Print	ed Name	
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VEND	DORNAME: Insight North America	1					
	Criteria	1	Point Point	Score			
Α	Experience and Expertise The firm's personnel relevant experience and performanaging similar local government funds, and the experience and qualification of the investment managing individuals assigned to this account	experience,	0-30	27			
В	Approach and Discipline Investment philosophy and strategy and demonstrated inve performance. Ability to provide necessary portfolio account services. Understanding of the scope of services required and ability to provide these services	ting	0-25	25			
С	References		0-10	10			
D	Accounting and Reporting		0-10	10			
E	Cost The firm providing the lowest price to the City will receive the max points. Firms should utilize the City's overall combined (cash portfolio market values as of June 30, 2013 in determining bid proto submit. Points will be awarded to other proposers in the following the control of th	n and core) oposal price	0-25	22	25 A	-	
	25 - [25 points X (total cost - lowest total cost) / lowest total cost]						
	Note: If the result is a negative number, the score assigned will be	0					
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000						
	Proposal 1 being the lowest, would achieve a score of 25 points						
	Proposal 2 would achieve a score of 17.5 points, calculated as foll 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points	lows:					
	Sub-Total*		0-100	AT .	97 AU	•	
*0-5%	Tier1/Tier2 Local Business will be calculated on combined s	scoring totals	of each	company.	-		
	Total*			94	91 AT		
Comn	Nery solid approach to ssets under management is	invest	ing C	ity F	Jacoba Jacoba		
Clit	Clients, not as well represented as some of the other for respondents. Price is very competitive						
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A.	Jun-Prèse 12/11/2018	And	rew	Je a	1-pierre		

	RFP P-52-16 – Investment Management Service	es	
VEND	OR NAME: PFM ASSET Management	Daint	
	<u>Criteria</u>	<u>Point</u> Range	<u>Score</u>
Α	Experience and Expertise The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account	0-30	30
В	Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services	0-25	23
С	References	0-10	10
D	Accounting and Reporting	0-10	10
E	Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner:	0-25	\$ 3 AT
	25 – [25 points X (total cost – lowest total cost) / lowest total cost]		
	Note: If the result is a negative number, the score assigned will be 0		
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000		
	Proposal 1 being the lowest, would achieve a score of 25 points		
	Proposal 2 would achieve a score of 17.5 points, calculated as follows: 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points		
	Sub-Total*	0-100	73.76 AT
*0-5%	Tier1/Tier2 Local Business will be calculated on combined scoring totals	s of each c	ompany.
	Total*		18 76 AT
Comn	<u>nents</u>		
No The	tronal Firm with a very impressional creden on da clients. Very strong creden inghest among all the Firsts	ive trals	Price was
Signa	ture of Evaluator Date Print 12/11/2017 An	ed Name	Jean-pierre

VEND	OR NAME: PIMCO				
	<u>Criteria</u>	Point Range	Score		
Α	Experience and Expertise The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account	0-30	23		
В	Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services	0-25	23		
С	References	0-10	0		
D	Accounting and Reporting	0-10	10		
E	Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner:	0-25	35	Op	12
	25 – [25 points X (total cost – lowest total cost) / lowest total cost]				
	Note: If the result is a negative number, the score assigned will be 0				
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000				
	Proposal 1 being the lowest, would achieve a score of 25 points				
	Proposal 2 would achieve a score of 17.5 points, calculated as follows: 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points				
	Sub-Total*	0-100	81	56	95
*0-5%	Tier1/Tier2 Local Business will be calculated on combined scoring totals	s of each		. /	
	Total*		8	56	AJ
Comr	nents Ven impressive Assets inde Afolio, Number of Flondy Client Go	Molan	ngen	nert	_
015	21 - 2	verin Lefer	0115	She	2+
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VEND	OOR NAME: Public Trust Advisors						
	<u>Criteria</u>	<u>Point</u> Range	Score				
Α	Experience and Expertise The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account	0-30	27				
В	Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services	0-25	25				
С	References	0-10	10				
D	Accounting and Reporting	0-10	10				
E	Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner:	0-25	The	20 AT			
	25 – [25 points X (total cost – lowest total cost) / lowest total cost]						
	Note: If the result is a negative number, the score assigned will be 0						
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000						
	Proposal 1 being the lowest, would achieve a score of 25 points						
	Proposal 2 would achieve a score of 17.5 points, calculated as follows: 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points						
	Sub-Total*	0-100	88	92 AS			
*0-5%	Tier1/Tier2 Local Business will be calculated on combined scoring totals	s of each	company.				
	Total*		88	92 AT			
Comr	Comments very impressive 18+ of Florida Client, Assets						
M	les monagements not as substantial a	as of	ners	ispondents.			
TU	Cing is in the middle of the par	CK					
Η,	Jean-from 12/11/2018 Andr	ew J	earp	ere			
Signa	ture of Evaluator Date Prints	ed Name					

VEND	OOR NAME: Sawgras	s Asset Man	agent	Doint		
		<u>Criteria</u>		<u>Point</u> Range	Score	
Α	Experience and Expertise The firm's personnel relev managing similar local gov resources and qualification individuals assigned to this ac-	ernment funds, and the of the investment ma	experience,	0-30	24	
В	Approach and Discipline Investment philosophy and str performance. Ability to provid services. Understanding of th and ability to provide these se	e necessary portfolio accou e scope of services required	nting	0-25	<u> </u>	
С	References			0-10	10	
D	Accounting and Reporting			0-10	10	
Е	Cost The firm providing the lowest price points. Firms should utilize the portfolio market values as of Jun to submit. Points will be awarded	City's overall combined (ca e 30, 2013 in determining bid	sh and core) proposal price	0-25	18 7	2) As
	25 - [25 points X (total cost - low	est total cost) / lowest total cos	st]			
	Note: If the result is a negative nu	imber, the score assigned will	be 0			
	Example: Proposal 1: \$100,000 F	Proposal, 2: \$130,000				
	Proposal 1 being the lowest, wou	ld achieve a score of 25 points				
	Proposal 2 would achieve a score 25 – [25 X (\$130,000 – \$100,000		follows:			
	Sub-Total*			0-100	87	90 AT
*0-5%	Tier1/Tier2 Local Business wil	I be calculated on combined	d scoring totals	s of each	company.	•
	Total*				8	90 AT
Comr	Good list of fl	orda client.	Assets	s m	esm	an agenest
00.	t as Substant	tial as some	of the	bigge	Ses,	andents,
A.	Den-Iren	12/11/2018	Andre	W J	ean-p	olere
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VEND	OR NAME: Victory capital Management	Daint						
	/ <u>Criteria</u>	<u>Point</u> Range	Score					
Α	Experience and Expertise The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account	0-30	20					
В	Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services	0-25	20					
С	References	0-10						
D	Accounting and Reporting	0-10	10					
E	Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner:	0-25	\$ 10	As				
	25 – [25 points X (total cost – lowest total cost) / lowest total cost]							
	Note: If the result is a negative number, the score assigned will be 0							
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000							
	Proposal 1 being the lowest, would achieve a score of 25 points							
	Proposal 2 would achieve a score of 17.5 points, calculated as follows: 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points							
	Sub-Total*	0-100	65 7	0 42				
*0-5%	Tier1/Tier2 Local Business will be calculated on combined scoring totals	s of each	company.					
	Total*	•	65 70	D AT				
	ments hossels under management not a	S 54	65tantia					
05	as some of the bisger respondent, Duerall response							
t CC	some of the bigger respondent, over a RFP was not as detailed, metice with other respondents Pid of	Price	e not	(ecomenty)				
Ciana	turn of Evaluator)				
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VEND	ORNAME: Well capital Management					
	<u>Criteria</u>	Point Pango	Score			
Α	Experience and Expertise The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account	<u>Range</u> 0-30	30			
В	Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services	0-25	22			
С	References	0-10	10			
D	Accounting and Reporting	0-10	10			
E	Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner:	0-25	\$10 AJ			
	25 – [25 points X (total cost – lowest total cost) / lowest total cost]					
	Note: If the result is a negative number, the score assigned will be 0					
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000					
	Proposal 1 being the lowest, would achieve a score of 25 points					
	Proposal 2 would achieve a score of 17.5 points, calculated as follows: 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points					
	Sub-Total*	0-100	72 82 AS			
*0-5%	Tier1/Tier2 Local Business will be calculated on combined scoring total	s of each	company.			
	Total*		77 82 AD			
Was very good for their proposed team. Assets under						
Wus	very good for their proposed team. It	55e75	moer			
Me (e.	nugement was a SO comparable with so spondents, Price was a bit high, Reco smewhat aggressive compared to our	onne o	of the bigger ndations were			
Signa	iture of Evaluator Date Print	ted Name				
A	Fran-Prono 12/11/2018 And	rew -	Jean-pierre			

VEND	OR NAME: Chandler Asse	t Manageme	nt	Dalat	
	Criteria	<u>a</u>		<u>Point</u> Range	Score
Α	Experience and Expertise The firm's personnel relevant expending similar local government resources and qualification of the individuals assigned to this account	funds, and the ex	xperience,	0-30	25
В	Approach and Discipline Investment philosophy and strategy ar performance. Ability to provide necess services. Understanding of the scope and ability to provide these services	sary portfolio accounti	ng	0-25	25
С	References			0-10	10
D	Accounting and Reporting			0-10	10
E	Cost The firm providing the lowest price to the points. Firms should utilize the City's of portfolio market values as of June 30, 201 to submit. Points will be awarded to other	overall combined (cash 13 in determining bid pro	and core) posal price	0-25	2 13 Jah
	25 - [25 points X (total cost - lowest total of	cost) / lowest total cost]			
	Note: If the result is a negative number, the	e score assigned will be	0		
	Example: Proposal 1: \$100,000 Proposal,	2: \$130,000			
	Proposal 1 being the lowest, would achieve	e a score of 25 points			
	Proposal 2 would achieve a score of 17.5 25 – [25 X (\$130,000 – \$100,000) / \$100,0		ows:		0
	Sub-Total*			0-100	79 83 3h
*0-5%	Tier1/Tier2 Local Business will be calc	culated on combined s	coring totals	s of each c	ompany.
	Total*				
Comr	nents \$ 12.86illion t	133 public	e agen	ues.	EST. 1998
luplouse - owned					
Tay	M. Voul T:	2/11/18	PHycu	5 A.	KORAB
Signa	ture of Evaluator	Date	Print	ed Name	

VEND	OR NAME: Tasight North	America			
	Criteri	<u>a</u>		<u>Point</u> Range	Score
Α	Experience and Expertise The firm's personnel relevant experience similar local government resources and qualification of the individuals assigned to this account	t funds, and the exp	erience,	0-30	30
В	Approach and Discipline Investment philosophy and strategy at performance. Ability to provide neces services. Understanding of the scope and ability to provide these services	sary portfolio accounting	3	0-25	25
С	References			0-10	10
D	Accounting and Reporting			0-10	10
E	Cost The firm providing the lowest price to the points. Firms should utilize the City's portfolio market values as of June 30, 20 to submit. Points will be awarded to other	overall combined (cash a 13 in determining bid propo	and core) osal price	0-25	10 22 25 Jh
	25 – [25 points X (total cost – lowest total	cost) / lowest total cost]			
	Note: If the result is a negative number, the	e score assigned will be 0			
	Example: Proposal 1: \$100,000 Proposal,	2: \$130,000			
	Proposal 1 being the lowest, would achieve	e a score of 25 points			
	Proposal 2 would achieve a score of 17.5 25 – [25 X (\$130,000 – \$100,000) / \$100,	points, calculated as follow 000] = 17.5 points	vs:		
	Sub-Total*			0-100	91 100
*0-5%	Tier1/Tier2 Local Business will be cal	culated on combined sco	oring total	s of each o	company.
	Total*				
Comi	ments Current City	contractor	- 5	Hores	la clients
In	temptional \$6	.46.11ion 1	'oral	gove	mment
Inv	estment Go B	DOND & CRA	port	folis	experience
	My Coral	2/11/18	Pttyc	US #	1. KORAB
Signa	uture of Evaluator	Date	Prin	ted Name	

VEND	OR NAME: Paulie Inve	estment Man	agement	Con	upany (PIMC
	' //	<u>teria</u>	0	Point Range	Score
A	Experience and Expertise The firm's personnel relevant managing similar local governn resources and qualification of individuals assigned to this accour	nent funds, and the the investment ma	experience,	0-30	15
В	Approach and Discipline Investment philosophy and strateg performance. Ability to provide ne services. Understanding of the sc and ability to provide these service	cessary portfolio accou ope of services require	nting	0-25	20
С	References			0-10	<u>Ø</u>
D	Accounting and Reporting			0-10	10
E	Cost The firm providing the lowest price to points. Firms should utilize the City portfolio market values as of June 30 to submit. Points will be awarded to o	y's overall combined (ca , 2013 in determining bid	sh and core) proposal price	0-25	25 On
	25 – [25 points X (total cost – lowest to	otal cost) / lowest total co	st]		
	Note: If the result is a negative number	er, the score assigned will	be 0		
	Example: Proposal 1: \$100,000 Propo	osal, 2: \$130,000			
	Proposal 1 being the lowest, would ac	hieve a score of 25 points			
	Proposal 2 would achieve a score of 1 25 – [25 X (\$130,000 – \$100,000) / \$1		follows:		
	Sub-Total*			0-100	70 45 le
*0-5%	Tier1/Tier2 Local Business will be	calculated on combine	d scoring totals	s of each o	ompany.
	Total*				
Can	Large firm. L. st. 1971	subsidiary of	LAllian	Horis	Isset Mynt.
2	M. Joral	12/11/18	PHyc	us A	. KORAB
Signa	ure of Evaluator	Date	Print	ed Name	

RFP P-52-18 - Investment Management Services

VEND	ORNAME: PFM HSSEL Management		
	Criteria	<u>Point</u> Range	Score
A	Experience and Expertise The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account	0-30	30
В	Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services	0-25	25
С	References	0-10	10
D	Accounting and Reporting	0-10	10
E	Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner:	0-25	Jahr
	25 – [25 points X (total cost – lowest total cost) / lowest total cost]		
	Note: If the result is a negative number, the score assigned will be 0		
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000		
	Proposal 1 being the lowest, would achieve a score of 25 points		
	Proposal 2 would achieve a score of 17.5 points, calculated as follows: 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points		
	Sub-Total*	0-100	75 78 ple
*0-5%	Tier1/Tier2 Local Business will be calculated on combined scoring total	s of each	company.
	Total*		
Comr	ments Horida chents. 29 yrs & opera	from	
\$13	9 billion 136 cities Financial	e adr	usor to City in
pa	st Florida HQ Minimum annu	al fe	e= 25K
Par.	A Voul + stite 8 PHyc	us A	. KORAB

Signature of Evaluator

Date

Printed Name

	RFP P-52-16 – Investment Management Service	es				
VEND	DORNAME: Public Trust Advisor LLC					
	Criteria	<u>Point</u> Range	Score			
Α	Experience and Expertise The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account	0-30	30			
В	Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services	0-25	<u>20</u>			
С	References	0-10	10			
D	Accounting and Reporting	0-10	10			
E	Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner:	0-25	20 20 ph			
	25 – [25 points X (total cost – lowest total cost) / lowest total cost]					
	Note: If the result is a negative number, the score assigned will be 0					
	Example: Proposal 1: \$100,000 Proposal, 2: \$130,000					
	Proposal 1 being the lowest, would achieve a score of 25 points					
	Proposal 2 would achieve a score of 17.5 points, calculated as follows: 25 – [25 X (\$130,000 – \$100,000) / \$100,000] = 17.5 points		1			
	Sub-Total*	0-100	36 90 gl			
*0-5%	6 Tier1/Tier2 Local Business will be calculated on combined scoring total	s of each	company.			
	Total*					
Comi	ments EST. 2011 Some Florida Chen	ts-	Orlando office			
I	Denver HQ Former Pompano Beach contractor					
MI	rimal vecommendation to City's Inv	espen	ent policy.			
Page A. Word 12 11/18 PHyons A. KORAB						

Signature of Evaluator

Date

Printed Name

RFP P-52-18 – Investment Management Services

VENDOR NAME: SAW GRASS **Point** Criteria Score Range 0-30 A **Experience and Expertise** The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account В 0 - 25Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services C 0-10 References 0 - 10D **Accounting and Reporting** E 0 - 25Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner: 25 - [25 points X (total cost - lowest total cost) / lowest total cost] Note: If the result is a negative number, the score assigned will be 0 Example: Proposal 1: \$100,000 Proposal, 2: \$130,000 Proposal 1 being the lowest, would achieve a score of 25 points Proposal 2 would achieve a score of 17.5 points, calculated as follows: $25 - [25 \times (\$130,000 - \$100,000) / \$100,000] = 17.5 \text{ points}$ Sub-Total* *0-5% Tier1/Tier2 Local Business will be calculated on combined scoring totals of each company. Total* Comments BT. 1998. Employ

Date

Printed Name

Signature of Evaluator

RFP P-52-18 – Investment Management Services APITAL MONT. INC. VENDOR NAME: **Point** Criteria Range 0-30 A **Experience and Expertise** The firm's personnel relevant experience and performance in managing similar local government funds, and the experience, resources and qualification of the investment managers and individuals assigned to this account 15 0-25 B Approach and Discipline Investment philosophy and strategy and demonstrated investment performance. Ability to provide necessary portfolio accounting services. Understanding of the scope of services required by the City and ability to provide these services C 0-10 References 0-10 D **Accounting and Reporting** 0-25 E Cost The firm providing the lowest price to the City will receive the maximum of 25 points. Firms should utilize the City's overall combined (cash and core) portfolio market values as of June 30, 2013 in determining bid proposal price to submit. Points will be awarded to other proposers in the following manner: 25 - [25 points X (total cost - lowest total cost) / lowest total cost] Note: If the result is a negative number, the score assigned will be 0 Example: Proposal 1: \$100,000 Proposal, 2: \$130,000 Proposal 1 being the lowest, would achieve a score of 25 points Proposal 2 would achieve a score of 17.5 points, calculated as follows: $25 - [25 \times (\$130,000 - \$100,000) / \$100,000] = 17.5 \text{ points}$ 0-100 Sub-Total* *0-5% Tier1/Tier2 Local Business will be calculated on combined scoring totals of each company. Total* Comments

Signature of Evaluator

Date

Printed Name

VEND	OR NAME: WEUS CAPITA	AL MONT.	_		
	Crite	ria		<u>Point</u> Range	Score
A	Experience and Expertise The firm's personnel relevant e managing similar local governme resources and qualification of individuals assigned to this account	ent funds, and the	experience,	0-30	<u>30</u>
В	Approach and Discipline Investment philosophy and strategy performance. Ability to provide neces services. Understanding of the scop and ability to provide these services	essary portfolio accor be of services require	unting	0-25	20
С	References			0-10	10
D	Accounting and Reporting			0-10	10
E	Cost The firm providing the lowest price to the points. Firms should utilize the City's portfolio market values as of June 30, 2 to submit. Points will be awarded to other contents.	overall combined (c 2013 in determining bid	ash and core) proposal price	0-25	510 Jale
	25 - [25 points X (total cost - lowest total	al cost) / lowest total co	ost]		
	Note: If the result is a negative number,	the score assigned will	l be 0		
	Example: Proposal 1: \$100,000 Proposa	al, 2: \$130,000			
	Proposal 1 being the lowest, would achieve	eve a score of 25 point	s		
	Proposal 2 would achieve a score of 17. 25 – [25 X (\$130,000 – \$100,000) / \$100		follows:		
	Sub-Total*			0-100	75 80
*0-5%	Tier1/Tier2 Local Business will be ca	alculated on combine	ed scoring totals	s of each o	company.
	Total*				
Comments Large firm. Stable team, Recommended					
Sa	pending to BBB	rated,	Some F	loris	la chents
2	afte A. (Local	2/11/18	PHYC	US A	1. KORAB
Signa	ture of Evaluator	Date	Print	ed Name	