

**RFP No. 6352 Investment Advisor Services**
**Sr. Buyer: Cynthia Perez**

Proposal Evaluation	Score	Hilltop Securities Asset Management, LLC	Meeder Public Funds, Inc.	Valley View Consulting, LLC	Deep Blue Investment Advisors
		Dallas, Texas	Dublin, Ohio	Huddleston, VA	Tampa, FL
<b>Minimum Qualifications</b>					
SEC Investment Advisor Representative Public Dis. Report	Pass/Fail	✓	✓	✓	✓
Texas State Securities Board Certificate of Registration	Pass/Fail	✓	✓	✓	✓
Required five years as an SEC Investment Advisor	Pass/Fail	✓	✓	✓	✓
Three current investment advisor clients that are Texas governmental entities and three former client references	Pass/Fail	✓	✓	✓	✗
No outstanding lawsuits during last 5 years or current litigation with the City during last 5 years	Pass/Fail	✓	✓	✓	✓
No outstanding regulatory issues last five years	Pass/Fail	✓	✓	✓	✓
References Provided for firm	Pass/Fail	✓	✓	✓	✓
<b>Minimum Qualifications</b>	Pass/Fail	✓	✓	✓	✗
<b>Local Preference</b>	<b>10.00</b>				
Points	10.00	0.00	0.00	0.00	0.00
<b>Technical Proposal</b>					
Firms' Experience	25.00	22.99	19.67	18.34	N/A
Team Experience	8.00	7.67	6.33	5.67	N/A
Understanding of Project Scope	7.00	7.00	5.33	5.33	N/A
<b>Subtotal Technical Proposal</b>	<b>40.00</b>	<b>37.66</b>	<b>31.33</b>	<b>29.34</b>	<b>N/A</b>
<b>Interview</b>					
Firms' Experience	15.00	14.33	10.67	11.33	N/A
Team Identification	8.00	7.67	6.00	6.67	N/A
Understanding of Project Scope	7.00	6.67	4.33	6.33	N/A
<b>Subtotal Interview</b>	<b>30.00</b>	<b>28.67</b>	<b>21.00</b>	<b>24.33</b>	<b>N/A</b>
<b>Price</b>					
Cost information	<b>20.00</b>				
<b>Subtotal Pricing</b>		<b>6.24</b>	<b>20.00</b>	<b>10.40</b>	<b>N/A</b>
<b>Total</b>	<b>100.00</b>	<b>72.57</b>	<b>72.33</b>	<b>64.07</b>	<b>N/A</b>