

RFP No. 2126 - Investment Advisor Services

Summary Evaluation Matrix

Proposal Evaluation	Patterson Capital Management, LP	Public Trust Advisors, LLC	TCG Advisors, LP	Valley View Consulting, LLC
Minimum Qualifications				
SEC Investment Adviser Representative Public Disclosure Report	Pass	Pass	Pass	Pass
Required five years in business as an SEC Investment Advisor	Pass	Pass	Pass	Pass
Three current investment advisor clients that are Texas governmental entities with references	Pass	Pass	Pass	Pass
No outstanding lawsuits during last 5 years or current litigation with the City during last 5 years	Pass	Pass	Pass	Pass
No outstanding regulatory issues last 5 years	Pass	Pass	Pass	Pass
References Provided for firm	Pass	Pass	Pass	Pass
Technical Proposal				
<i>Technical Proposal (35 points)</i>	33	27	23	28
Firms' Experience (20 points)				
Team Experience (8 points)				
Understanding of Project Scope (7 points)				
Interview				
<i>Interview (30 points)</i>	29	24	0	26
Firms' Experience (15 points)				
Team Identification (8 points)				
Understanding of Project Scope (7 points)				
Price				
<i>Price (35 points)</i>	35	0	0	11
Total	97	51	23	64