

City of Naples

17-039

Investment Advisory Services RFP

10/06/2017 -1- of -1-

RESPONDENTS	COMMITTEE MEMBERS								TOTAL POINTS	OVERALL RANK
	Ann Marie Ricardi		Tarin Bachle		Jodi Bain		Erica Martin			
	SCORE	97	SCORE tie	95	SCORE	75	SCORE	87		
Chandler Asset Management	RANK	2	RANK	2	RANK	2	RANK	2		2
	POINTS	3	POINTS	2.5	POINTS	3	POINTS	3	11.5	
	SCORE	91	SCORE tie	95	SCORE	70	SCORE	80		
PFM Asset Management LLC	RANK	3	RANK	2	RANK	4	RANK	3		3
	POINTS	2	POINTS	2.5	POINTS	1	POINTS	2	7.5	
	SCORE	32	SCORE	60	SCORE	74	SCORE	52		
Garcia Hamilton & Assoc.	RANK	4	RANK	4	RANK	3	RANK	4		4
	POINTS	1	POINTS	1	POINTS	2	POINTS	1	5.0	
	SCORE	99	SCORE	97	SCORE	98	SCORE	94		
Public Trust Advisors	RANK	1	RANK	1	RANK	1	RANK	1		1
	POINTS	4	POINTS	4	POINTS	4	POINTS	4	16.0	
	SCORE		SCORE		SCORE		SCORE			
	RANK		RANK		RANK		RANK			
	POINTS		POINTS		POINTS		POINTS			
1st place receives 4 points, 2nd place 3 points, 3rd place 2 points, etc.										