



# City of San Antonio

## Legislation Details (With Text)

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**Type:** Staff Briefing - Without Ordinance

**In control:** Audit and Accountability Committee

**On agenda:** 3/19/2019

**Title:** Financial Underwriter RFP [Ben Gorzell, Chief Financial Officer; Troy Elliott, Deputy Chief Financial Officer]

**Sponsors:**

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**Attachments:** 1. Presolicitation - Underwriter - 03.13.19 v4

Date	Ver.	Action By	Action	Result
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## CITY OF SAN ANTONIO FINANCE DEPARTMENT INTERDEPARTMENTAL CORRESPONDENCE

**TO:** Erik Walsh, City Manager

**FROM:** Troy Elliott, CPA, Deputy Chief Financial Officer

**COPIES:** Audit and Accountability Committee; Ben Gorzell, Jr., CPA, Chief Financial Officer Kevin Barthold, City Auditor

**SUBJECT:** Pre-Solicitation Briefing for Local Financial Underwriting Services

**DATE:** March 19, 2019

The San Antonio Finance Department will present a pre-solicitation briefing for the selection of qualified local firm(s) to expand the City's financial underwriting pool (the "Pool"). This briefing will allow an opportunity for input and direction from Committee members.

This pre-solicitation briefing will cover projected timeline, high profile designation, scope of the project, term of the Pool, proposed scoring criteria, evaluation committee members, local preference program applicability, veteran owned small business preference program applicability and SBEDA Program requirements.

The City is requesting qualifications from qualified local firms to expand the Pool which is comprised of firms utilized for the selection of underwriting syndicates for financial transactions effectuated by the City over the term of the Pool.

The underwriters will be required to provide professional services and perform the duties of Senior Managing Underwriter and Co-Managing Underwriter as selected for certain transactions and other services as necessary.