

FINAL SCORE MATRIX

RFP for Insurance Broker of Record & Consulting Services (25-060; 6100018875) Score Summary *FINAL EVALUATION August 6, 2025	Maximum Points	SOGO Wealth & Risk Management, LLC 10127 Coachlight St San Antonio, TX 78216	Alliant Insurance Services, Inc. 18100 Von Karman Ave., 10th Floor Irvine, CA 92612	Arthur J. Gallagher & Co. 12750 Merit Drive, Suite 1000 Dallas, TX 75251
A - Experience, Background and Qualifications	30	29.40	17.40	20.80
B - Proposed Plan	30	29.00	19.80	21.60
A - B Sub-Total	60	58.40	37.20	42.40
C - Price	15	14.27	15.00	9.11
D - SBEDA - SBE Prime Contract Program	10	10.00	0.00	0.00
E - Local Preference Program	10	10.00	0.00	0.00
F - Veteran-Owned Small Business Preference Program	5	0.00	0.00	0.00
TOTAL SCORE	100	92.67	52.20	51.51
RANK BASED ON TOTAL SCORE		1	2	3

*One evaluation meeting held, and no interviews conducted.