

## ADVERTISEMENT INFORMATION ONLY

Solicitation Type and Name: **Request for Proposals – Investment Consulting & Investment Training**

Solicitation Number: RFP 26-088; RFx 610019705

Description: The City of San Antonio – Finance Department (City) is seeking proposals from qualified investment consultants to provide investment consulting services related to the City's investment portfolio and to provide invest training to the City's authorized investment officers in accordance with the Texas Public Funds Act.

Applicable Product Categories: 91849 – Finance and Economics Consulting

**Date Issued: June 15, 2026**

**Due Date & Time: July 17, 2026, 11:00 a.m. Central Time**

**Pre-Submittal Conference:** Pre-Submittal Conference will be held at 10:30 a.m., Central Time, on June 22, 2026 via Webex. Attendance at the Pre-Submittal Conference is optional, but highly encouraged.

Respondents may call the toll-free number listed below and enter access code to participate the day of the conference.

**Dial-In Number:** 1-415-655-0001 | **Access Code:** 2341 680 4476 | **Meeting Password:** COSA

**Join from the meeting link:**

<https://sanantonio.webex.com/sanantonio/j.php?MTID=mf39ee5d933cbeff4e0f0d92e6c449491>

**Evaluation Committee Voting Members:**

Margaret U. Villegas, Assistant Director, Finance Department  
Alejandro Tijerina, Financial Management Administrator, Finance Department  
Rozeanne Cantu, Financial Manager, Finance Department  
Brett Sekula, Investment Officer, Finance Department  
David Colon, Banking Officer, Finance Department

**Pursuant to Section 011 – Restriction on Communications and in accordance with and as authorized by Section 2-61 of the City Code, the following restrictions on communications apply to this solicitation: Respondents are prohibited from contacting 1) City officials, as defined by §2-62 of the City Code of the City of San Antonio, regarding the RFP or proposal from the time the RFP has been released until the contract is posted for consideration as an agenda item during a meeting designated as an A session; and 2) City employees from the time the RFP has been released until the contract is approved at a City Council “A” session.**



Exceptions to the Restrictions on Communications:

Respondents may submit written questions concerning this RFP to the Staff Contact Person listed below until **4:00 p.m., Central Time, on June 25, 2026**. Questions received after the stated deadline will not be answered. All questions shall be sent by e-mail. Questions submitted and the City's responses will be posted with this solicitation.

**Morgan Aguirre, Procurement Specialist III**  
**City of San Antonio, Finance Department – Procurement Division**  
[morgan.aguirre@sanantonio.gov](mailto:morgan.aguirre@sanantonio.gov)

**To view this solicitation**, go to the SAePS portal; <https://supplierservice.sanantonio.gov/irj/portal>  
If you have not completed the City's SAePS Vendor Registration, you must do so in order to view the solicitation and submit a response. Once you have logged on to the SAePS portal, click on "My Bids" (first), if not viewable then click "Other Bids" (to view all already published competitive bids). Vendor Guides & Support can be accessed from this link:  
<https://www.sa.gov/Directory/Departments/Finance/About/Divisions/Procurement/Resources/Guides-Support>

**TO REGISTER:** You will need to complete the vendor registration by accessing the SAePS Vendor Registration at  
<https://www.sa.gov/Directory/Departments/Finance/About/Divisions/Procurement/Become-a-Vendor>.  
Questions regarding registration may be submitted to Vendor Support at (210) 207-0118 or by email at [vendors@sanantonio.gov](mailto:vendors@sanantonio.gov) with "SAePS Portal" on the subject line so this can be expedited.

