



ADVERTISEMENT INFORMATION ONLY

**Solicitation Type and Name: Request for Qualifications – Financial Underwriting Pool**

**Solicitation Number:** RFP 22-142; RFX 6100016180

**Description:** The City of San Antonio Finance Department (the “City”) is requesting qualifications from qualified firms (headquartered or have an established business presence for at least one year with a minimum of 100 employees in the incorporated limits of the City) to expand the City’s financial underwriting 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.

**Applicable Product Categories: 94649-Financial Services**

**Date Issued: November 18, 2022**

**Due Date & Time: January 17, 2023, 11:00 a.m. Central Time**

**Pre-Submittal Conference: The conference will be held via WebEx call at 2:00 p.m., Central Time, on November 28, 2022. Attendance is optional, but highly encouraged. Respondents may call:**

**Toll Free Number: 1-415-655-0001**

**Meeting number (access code): 2463 506 3167**

**Meeting password: COSA**

**Staff Contact Person:** Valeri Jasso, Procurement Specialist III, [valeri.jasso@sanantonio.gov](mailto:valeri.jasso@sanantonio.gov)

**Evaluation Committee Voting Members:**

Ben Gorzell, Jr., CPA, Chief Financial Officer

Troy Elliot, CPA, Deputy Chief Financial Officer

Margaret Villegas, Assistant Director, Finance Department

Alejandro Tijerina, Financial Management Administrator, Finance Department

Michael Garnier, Assistant Aviation Director

Anne Burger Entrekina, Senior Managing Director, Hilltop Securities Inc.

Paul Jack, Senior Managing Director, Estrada Hinojosa Investment Bankers

**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 RFQ or proposal from the time the RFQ 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 RFQ 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 RFQ to the Staff Contact Person listed below until **4:00 p.m., Central Time, on December 9, 2022**. Questions received after the stated deadline will not be answered. All questions shall be sent by e-mail to:

**Valeri Jasso, Procurement Specialist III**

**City of San Antonio, Finance Department – Purchasing Division**

[valeri.jasso@sanantonio.gov](mailto:valeri.jasso@sanantonio.gov)

Questions submitted and the City’s responses will be posted with this solicitation.

All proposals **must** be submitted electronically through the portal. **ONLY ELECTRONIC SUBMISSIONS WILL BE ACCEPTED.**

**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).

**TO REGISTER:** You will need to complete the vendor registration by accessing the SAePS Vendor Registration at <http://www.sanantonio.gov/purchasing/SAePS.aspx>. Questions regarding registration may be submitted to the SAePS Hotline 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.

Finance Department, Purchasing Division

PO Box 839966 ♦ San Antonio, TX 78283-3966 ☎ Tel: 210-207-5734

