

Tabulation of Submittals*

Purchasing Office Solicitation No.:		2018-006 (Municipal Advisor financial advisory services)			
Notice to submitters published in the Williamson Herald on:		11/9/17			
Number of potential submitters that were notified of / that submitted a submittal in response to this request for submittals:		14 / 3			
Date and time submittal due and publicly opened:		12/12/17 2:00 PM			
Present at opening of submittals:		John Werner of Cumberland Securities; Kristine Tallent of the City of Franklin Administration Department; and Natalie Keene, Suzanne Ward and Brian Wilcox of the			
Target meeting of BOMA at which recommendation is scheduled to be considered:		2/27/18			
Submittals received from:	Does the submittal include all required documents?	Does the submittal take any exceptions to the City's procurement solicitation? / If so, how many?	Average points allocated by submittal evaluation team (out of a possible 100, utilizing evaluation criteria as listed in RFQ):	Payment terms:	Submittal is valid and may be accepted through:
Cumberland Securities Company, Inc. 350 Lighthouse Pointe Dr. Lenoir City, TN 37772 PO Box 24508 Knoxville, TN 37933 Joseph K. Ayres, Sr., President 865-988-2663 Joe.Ayres@CumberlandSecurities.com	Yes	Submittal takes no exceptions [Sample Municipal Advisory Agreement not evaluated]	81.80	net 30 days	3/31/2018
PFM Financial Advisors LLC 530 Oak Court Drive, Suite 160 Memphis, TN 38117 Lauren Lowe, Managing Director 901-682-8386 lowel@pfm.com	Yes	Yes / 4 (Confidentiality and Proprietary rights; Indemnification; notice of cancellation of insurance; Regulatory Provisions) [proposed Agreement to be negotiated]	86.80	upon receipt	12/31/2018
Raymond James & Associates Richard Dulaney One Burton Hills Blvd., Suite 225 Nashville, TN 37215 Richard (Rick) Dulaney, Managing Director 615/665-6918 richard.dulaney@raymondjames.com	Yes	Submittal takes no exceptions [Disclaimer not evaluated]	80.40	net 30 days	3/31/2018

* Shaded submittal is the submittal scored highest by the interview team