



# MIAMI BEACH

OFFICE OF THE CITY MANAGER

LTC # 111-2014

LETTER TO COMMISSION

TO: Mayor Philip Levine and Members of the City Commission

FROM: Jimmy L. Morales, City Manager

DATE: April 3, 2014

SUBJECT: Evaluation Committee Relative to Request for Proposal (RFP) No. 2014-091-MF, for Investment Advisory Services.

The purpose of this LTC is to update the Mayor and City Commission on the Request for Proposal (RFP) No. 2014-091-MF, which seeks proposals from firms interested in providing the City with investment advisory services to manage and direct the City's investments.

The City has received six (6) responses pursuant to this RFP. Responsive proposals will be reviewed by the Evaluation Committee in accordance with the criteria established in the RFP.

I am considering appointing the following individuals to serve on the Evaluation Committee:

- Jim Goldsmith, Resident
- Sanford Horowitz, Resident
- Georgie Echert, Assistant Director, Finance Department
- James Sutter, Internal Auditor, OBPI
- Julie Santamaria, RBC Capital Markets

I am also considering the following individuals as alternates:

- Juan Rodriguez, Treasury Manager, Finance Department

I would appreciate any comments and/or suggestions you may have by Tuesday, April 7, 2014.

Thank you.

cc: Trish Walker, CFO  
 Mark Taxis, Assistant City Manager  
 Alex Denis, Procurement Department Director  
 Rafael Granado, City Clerk

RECEIVED  
 2014 APR - 8 AM 9:16  
 CITY CLERK'S OFFICE

JLM/MT/AD