



SHORT LIST SUMMARY SHEET

Initial Evaluation Committee Meeting

RFQ No. **GEN2126726Q1**

Library of Bond Underwriters

December 13, 2023

Governmental Center, 115 S. Andrews Avenue, Room 302

Fort Lauderdale, Florida 33301

Vendors <i>(Listed Alphabetically)</i>	Kevin Kelleher	Ronald Thomas	Douglas Wolfe	TOTAL	Shortlisted Firms
Barclays Capital, Inc.		X		1	
Blaylock Van, LLC				0	
B of A Securities, Inc.	X	X	X	3	X
*Citigroup Global Markets, Inc.		X	X	2	X
Estrada Hinojosa & Company, Inc.			X	1	
Hilltop Securities, Inc.				0	
J.P. Morgan Securities, LLC	X	X	X	3	X
Jefferies, LLC	X	X	X	3	X
KeyBanc Capital Markets, Inc.				0	
Loop Capital Markets, Inc.	X			1	
Morgan Stanley & Co., Inc.	X	X	X	3	X
Raymond James & Associates, Inc.	X	X	X	3	X
RBC Capital Markets, LLC	X	X	X	3	X
Samuel A. Ramirez & Company DBA Ramirez & Co., Inc.	X		X	2	X
San Blas Securities, LLC				0	
Siebert Williams Shank & Co., LLC	X	X		2	X
Truist Securities, Inc.				0	
Wells Fargo Bank, N.A. Municipal Finance Group	X	X	X	3	X

* Withdrawn: Citigroup Global Markets, Inc.

View results

Respondent

1

Anonymous

01:10

Time to complete

1. Committee Member's Name (first, last) *

Kevin Kelleher

2. Firm Name (Firms Listed Alphabetically) *

Please select 10 options.

- ☐ Barclays Capital, Inc.
- ☐ Blaylock Van, LLC
- ☒ B of A Securities, Inc.
- ☐ Citigroup Global Markets, Inc.
- ☐ Estrada Hinojosa & Company, Inc.
- ☐ Hilltop Securities, Inc.
- ☒ J.P. Morgan Securities, LLC
- ☒ Jefferies, LLC
- ☐ KeyBanc Capital Markets, Inc.
- ☒ Loop Capital Markets, Inc.
- ☒ Morgan Stanley & Co., Inc.
- ☒ Raymond James & Associates, Inc.
- ☒ RBC Capital Markets, LLC
- ☒ Samuel A. Ramirez & Company DBA Ramirez & Co., Inc.
- ☐ San Blas Securities, LLC
- ☒ Siebert Williams Shank & Co., LLC
- ☐ Truist Securities, Inc.
- ☒ Wells Fargo Bank, N.A. Municipal Finance Group

3. By submitting this document electronically, I certify that I have abided by the Cone of Silence Ordinance and have not been influenced or coerced by anyone in the evaluation of the firms for this procurement. *

- ☐ Select to certify.

View results

Respondent

2

Anonymous

02:18

Time to complete

1. Committee Member's Name (first, last) *

Ronald Thomas

2. Firm Name (Firms Listed Alphabetically) *

Please select 10 options.

- ☒ Barclays Capital, Inc.
- ☐ Blaylock Van, LLC
- ☒ B of A Securities, Inc.
- ☒ Citigroup Global Markets, Inc.
- ☐ Estrada Hinojosa & Company, Inc.
- ☐ Hilltop Securities, Inc.
- ☒ J.P. Morgan Securities, LLC
- ☒ Jefferies, LLC
- ☐ KeyBanc Capital Markets, Inc.
- ☐ Loop Capital Markets, Inc.
- ☒ Morgan Stanley & Co., Inc.
- ☒ Raymond James & Associates, Inc.
- ☒ RBC Capital Markets, LLC
- ☐ Samuel A. Ramirez & Company DBA Ramirez & Co., Inc.
- ☐ San Blas Securities, LLC
- ☒ Siebert Williams Shank & Co., LLC
- ☐ Truist Securities, Inc.
- ☒ Wells Fargo Bank, N.A. Municipal Finance Group

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- ☐ Select to certify.

View results

Respondent

3

Anonymous

03:06

Time to complete

1. Committee Member's Name (first, last) *

Douglas Wolfe

2. Firm Name (Firms Listed Alphabetically) *

Please select 10 options.

- ☐ Barclays Capital, Inc.
- ☐ Blaylock Van, LLC
- ☒ B of A Securities, Inc.
- ☒ Citigroup Global Markets, Inc.
- ☒ Estrada Hinojosa & Company, Inc.
- ☐ Hilltop Securities, Inc.
- ☒ J.P. Morgan Securities, LLC
- ☒ Jefferies, LLC
- ☐ KeyBanc Capital Markets, Inc.
- ☐ Loop Capital Markets, Inc.
- ☒ Morgan Stanley & Co., Inc.
- ☒ Raymond James & Associates, Inc.
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