

CONTRACT SUMMARY INFORMATION

SUMMARY: Purchase is made in accordance with the Terms and Conditions of Lee County Solicitation Number

Solicitation No.: RFP250046CJV
Project Title: Financial Advisor
Start Date: 05/06/2025
Expiration Date: 05/05/2028
Board Date: 05/06/2025
Agenda Item: 11
Term: 3 years
Renewals: 2 years

Awarded Vendor: PFM Financial Advisors LLC

Address Book (E1) No.: 496061

Contact Person: Sergio Masvidal

Phone No.: (786) 671-7480

Email Address: masvidal@pfm.com

NOTES:

MASTER CONTRACT NOTICE

This is an annual contract, which is not for any specific project. Work to be performed under this contract will be authorized, scheduled, funded, and accounted for by the issuance of County Purchase Order (PO), by the requesting department. The requesting County department reserves the right to provide additional project clarification details with the issuance of and within or attached to each PO. Such items shall be minor in nature such as providing for service completion dates, delivery locations, delivery and working hours, number of units, etc.