

## **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