

Evaluation Tab on Financial Advisors

	Points	RBC	BOK	WN
From the Interview				
Presentation/Interview	10	10	9	8
Staff Resources	10	9	9	5
Extra Services	10	6	10	4
Knowledge of Texas (Rules/regulations etc.)	10	9	10	7
Knowledge and market resources	10	10	9	5
Creativity	10	8	8	10
Conservative	10	8	10	7
Ongoing services	10	9	10	9
Their Homework about us	10	10	9	5
Standard Client/District Relationship	10	9	10	9
Working Relationship with Other District Partners	10	8	10	5
Compliance Issues	10	8	10	8
References	10	10	10	8
RFQ	10	10	8	6
	140	124	132	96

	RBC	BOK	WN
From the Interview			
Presentation	1	2	3
Staff Resources	2	1	3
Extra Services	2	1	3
Knowledge of Texas (Rules/regulations etc.)	2	1	3
Knowledge and market resources	1	2	3
Creativity	3	2	1
Conservative	2	1	3
Ongoing services	3	1	2
Their Homework about us	1	2	3
Standard Client/District Relationship	2	1	3
Working Relationship with Other District Partners	2	1	3
Compliance Issues	2	1	3
References	2	1	3
RFQ	1	2	3
	26	19	39