



UNITED INDEPENDENT SCHOOL DISTRICT AGENDA ACTION ITEM

Topic: Presentations by Finalist for Financial Advisor Services in response to RFP 021-2013

Submitted by: Ms. Cordelia Flores-Jackson of: Purchasing Department

Approved for transmittal to school board: June 11, 2013

Presentations to the Board of Trustees by the Finalists for RFP 021-2013 Financial Advisor Services

- 7:00 p.m. Southwest Securities
- 7:30 p.m. Estrada Hinojosa Investment Bankers

Rationale:

Staff has complied with all applicable federal, state and local purchasing policies and procedures in obtaining pricing information for the items listed above. Staff is recommending the awards based on being the best value to the district.

Budgetary Information:

The budget includes the funds for these purchases

Board Policy Reference and Compliance

CH local – purchasing and acquisition

CH legal – purchasing and acquisition