



THE COUNTY OF GALVESTON

FRANK RODRIGUEZ
PURCHASING AGENT

ASHLEY CLARK
ASST. PURCHASING AGENT

COUNTY COURTHOUSE
722 Moody (21st Street), Fifth (5th) Floor
Galveston, Texas 77550
(409) 770-5371

August 17, 2026

Honorable County Judge
And Commissioners' Court
County Courthouse
Galveston, Texas

RE: RFP 26-093, Investment Advisory Services

Gentlemen,

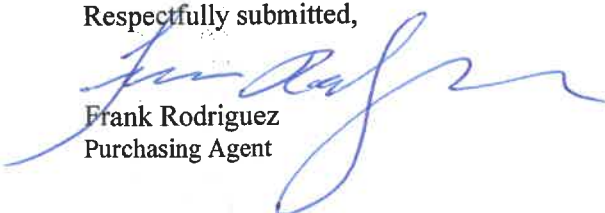
Proposals for RFP 26-093, Investment Advisory Services were opened on May 28, 2026. Ten (10) submittals were received from the following companies:

- | | |
|---|----------------|
| • Public Trust Advisors, LLC | Richardson, TX |
| • TCG Advisory Services, LLC | Austin, TX |
| • Guardian Capital US Asset Management, LLC | Charlotte, NC |
| • Meeder Public Funds, Inc. | Dublin, OH |
| • Wetz York Capital Management Group, LLC | |
| Dba Deep Blue Investment Advisors | Tampa, FL |
| • Cresta Advisors | Laredo, TX |
| • Hilltop Securities Asset Management, LLC | Austin, TX |
| • U.S. Bancorp Asset Management, Inc. | |
| Dba PFM Asset Management | Harrisburg, PA |
| • Valley View Consulting, LLC | Huddleston, VA |
| • TRB Wealth Management, LLC | Houston, TX |

After a thorough review of the submittals by the Evaluation Committee, Wetz York Capital Management Group, LLC dba Deep Blue Investment Advisors. received the best overall score and satisfied the RFP requirements.

Your consideration and approval of this award recommendation are respectfully requested.

Respectfully submitted,


Frank Rodriguez
Purchasing Agent

GALVESTON COUNTY

Budget Office



MEMORANDUM

Date: July 24, 2026

To: Francisco Rodriguez, Purchasing Agent

From: Diana Huallpa, Chief Financial Officer *DH*

CC: Christian Monterrubio, Deputy Chief Financial Officer

Sergio Cruz, County Auditor

Annaya Nigrelle, Chief Deputy County Clerk

Ashley Clark, Assistant Purchasing Agent

Tammy Dickey, Office Manager

Subject: RFP #26-093, Investment Advisory Services

The Evaluation Committee met to review and evaluate the proposals submitted for RFP #26-093, Investment Advisory Services. Each proposal was carefully considered, including written submissions, presentations, proposed costs, and the evaluation criteria established in the solicitation. Following the completion of the evaluation process, the committee has reached its recommendation.

After thorough discussion and scoring, the Evaluation Committee recommends awarding the contract to Deep Blue. Their proposal demonstrated a strong understanding of the County's investment objectives, a well-qualified team, a practical approach to providing ongoing advisory services, a competitive cost proposal, and the best overall value to Galveston County.

We believe this recommendation will provide the County with the expertise and support necessary to effectively manage its investment portfolio while maintaining compliance with applicable laws, policies, and investment objectives. The committee remains available should you or your office have any questions or require additional details regarding our evaluation process.





Project Criteria

Criteria	Points	Description
Experience and Qualifications	25 pts	
Team Qualifications and Staffing Plan	15 pts	
References and Past Performance	15 pts	
Service Approach and Methodology	20 pts	
Understanding of Investment Act and Regulatory Compliance	10 pts	
Cost and Fee Structure	15 pts	
Total	100 pts	



Scoring Summary

Active Submissions

Supplier	Total / 100 pts	Experience and Qualifications / 25 pts	Team Qualifications and Staffing Plan / 15 pts	References and Past Performance / 15 pts	Service Approach and Methodology / 20 pts
Deep Blue Investment Advisors	96 pts	23.25 pts	15 pts	13.75 pts	19 pts
Hilltop Securities Inc.	89.55 pts	24 pts	14.75 pts	14 pts	18 pts
Valley View Consulting, L.L.C.	86.8 pts	22 pts	13.5 pts	13.75 pts	18.75 pts
Meeder Public Funds	86.5 pts	24 pts	13.75 pts	14 pts	19.25 pts
Cresta Advisors	83.25 pts	21.5 pts	13 pts	13.25 pts	16.25 pts
PTMA Financial	80.57 pts	21 pts	14 pts	13 pts	16.75 pts



	Total	Experience and Qualifications	Team Qualifications and Staffing Plan	References and Past Performance	Service Approach and Methodology
Supplier	/ 100 pts	/ 25 pts	/ 15 pts	/ 15 pts	/ 20 pts
Solutions					
PFM Asset Management	80.45 pts	22.5 pts	13.25 pts	13 pts	9 pts
Sterling Capital Management LLC	78.95 pts	21.5 pts	13 pts	12.25 pts	16.5 pts
HUB Investment Partners, LLC	78.45 pts	19.75 pts	12.75 pts	11.75 pts	17.25 pts
TRB Wealth Management, LLC	76.23 pts	19.75 pts	13.25 pts	12.75 pts	16.25 pts

	Understanding of Investment Act and Regulatory Compliance	Cost and Fee Structure
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Supplier	/ 10 pts	/ 15 pts
Deep Blue Investment Advisors	10 pts	15 pts
Hilltop Securities Inc.	10 pts	8.8 pts
Valley View Consulting, L.L.C.	10 pts	8.8 pts
Meeder Public Funds	10 pts	5.5 pts
Cresta Advisors	9.75 pts	9.5 pts
PTMA Financial Solutions	10 pts	5.825 pts
PFM Asset Management	9.25 pts	13.45 pts
Sterling Capital Management LLC	9.25 pts	6.45 pts
HUB Investment	9.25 pts	7.7 pts



	Understanding of Investment Act and Regulatory Compliance	Cost and Fee Structure
Supplier	/ 10 pts	/ 15 pts
Partners, LLC		
TRB Wealth Management, LLC	10 pts	4.225 pts