



Seminole County

Resource Management - Purchasing & Contracts

Robert T. Bradley, Purchasing Manager

1301 East Second St., Sanford, FL 32771

TABULATION

RFP No. RFP-604926-25/LNF

RFP-604926-25/LNF – Term Contract for Fiduciary Services for Deferred Compensation Consulting Services

RESPONSE DEADLINE: April 30, 2025, at 2:00 pm

Report Generated: Wednesday, July 23, 2025

Vendors		
Burgess Chambers & Associates, Inc. DBA BCA, Inc. 315 E. Robinson Steet, Suite 690 Orlando, FL 32801 Burgess Chambers research@burgesschambers.com	Creative Planning Holdco, LLC DBA Creative Planning, LLC 5454 W 110 th Street Overland Park, KS 66211 Peter Mallouk paul.nacario@creativeplanning.com	Gallagher Benefit Services, Inc. DBA Gallagher Fiduciary Advisors, LLC 2850 Gold Road Rolling Meadows, IL 60008 William F. Ziebell Richard_snyder@ajg.com
HUB Investment Partners, LLC 900 S. Capital of TX Hwy, Suite 350 Austin, TX 78746 Scott Hauptmann rfp@tcgservices.com	Innovest Portfolio Solutions, LLC 7979 E. Tufts Avenue, Suite 1700 Denver, CO 80237 Wendy Dominguez chudek@innovestinc.com	Graystone <ul style="list-style-type: none">Withdrew bid 5/2/2025
NFP Retirement, Inc. 120 Vantis, Suite 400 Aliso Viejo, CA 92656 Brett Schneider matt.dickey@nfp.com	OneDigital Topco LLC DBA OneDigital Investment Advisors LLC 200 Galleria Parkway, Suite 1950 Atlanta, GA 30339 Chuck Ristau ronald.letaw@onedigital.com	SageView Advisory Group, LLC 4000 MacArthur Blvd., Suite 1050 Newport Beach, CA 92660 Jonathan Upham lgarcia@sageviewadvisory.com
Stifel, Nicolaus & Company, Inc. 501 N. Broadway St. Louis, MO 63102 Ronald J. Kruszewski stephen.brown@stifel.com		

Determination of awarded firm will be made based on total average ranking of each firm.

Tabulated by: Leticia Figueroa, Sr. Procurement Analyst (Posted 05/07/2025 @ 7:15 AM)

Recommendation/Intent to award to: Gallagher Fiduciary Advisors, LLC (Posted 07/23/2025 @ 3:15 PM)



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EVALUATION TABULATION
RFP No. RFP-604926-25/LNF
Fiduciary Services for Deferred Compensation Consulting Services
RESPONSE DEADLINE: April 30, 2025 at 2:00 pm
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RANKING SUMMARY

Vendor	Lorie Bailey-Brown	Christina Brandolini	Timothy Jecks	Total Score (Max Score 100)	Total Average Rank
Gallagher Fiduciary Advisors, LLC.	98 (1)	88 (1)	100 (1)	95.33	1
HUB Investment Partners, LLC	84 (2.5)	82 (4)	90 (3)	85.33	3.17
OneDigital Investment Advisors LLC	84 (2.5)	81 (5.5)	89 (4.5)	84.67	4.17
Innovest Portfolio Solutions LLC	73 (6.5)	85 (3)	91 (2)	83	3.83
SageView Advisory Group, LLC	75 (4)	81 (5.5)	88 (6.5)	81.33	5.33
Creative Planning, LLC	74 (5)	79 (7)	89 (4.5)	80.67	5.5
Stifel	67 (8)	86 (2)	88 (6.5)	80.33	5.5
NFP	73 (6.5)	74 (8)	76 (9)	74.33	7.83
Burgess Chambers & Associates, Inc.	64 (9)	69 (9)	78 (8)	70.33	8.67


EVALUATORS

Name	Title	Signature
Lorie Bailey-Brown	Chief Financial Officer/ AS Director	<i>Lorie Bailey Brown</i>
Christina Brandolini	Director HR	
Timothy Jecks	Director Budget Office	

Recommendation/Intent to award to: Gallagher Fiduciary Advisors, LLC. (Posted 07/24/2025 @ 4:30 PM)


EVALUATION TABULATION
RFP No. RFP-604926-25/LNF
Fiduciary Services for Deferred Compensation Consulting Services

EVALUATORS

Name	Title	Signature
Lorie Bailey-Brown	Chief Financial Officer/ AS Director	
Christina Brandolini	Director HR	 7/23/2025
Timothy Jecks	Director Budget Office	

Recommendation/Intent to award to: Gallagher Fiduciary Advisors, LLC. (Posted 07/24/2025 @ 4:30 PM)

EVALUATORS

Name	Title	Signature
Lorie Bailey-Brown	Chief Financial Officer/ AS Director	
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