

Notice Addendum



Identification

Reference Number:	22037366
Title:	THA - 12-0161 Financial Advisory Services
Agency Reference Number:	THA - 16-000000094700
Agency:	THA - Toll Highway Authority
Purchasing Agency:	THA - Toll Highway Authority
Purchasing Agency SPO:	Victoria Santiago
Date First Offered	05/03/2012
Status:	Published

Overview

Description and Specifications:
Addendum is being issued to correct the renewal amounts for Columbia Capital Management LL, Acacia Financial Group and A.C Advisory, Inc.

The upper limit of compensation of each of the three contracts changed from \$50,000 to \$75,000 subject to aggregate spending limits authorized by the Board.

Key Information

Notice Type:	Contract Renewal
Does this addendum add/or change vendor(s) information? (i.e. vendor name/address, contact information, and/or award amount, etc.)?	Yes
Published:	12/03/2015
Notice Expiration Date:	12/10/2015
Professional & Artistic:	Yes
Small Business Set-Aside:	No
	No

Does this solicitation contain
a BEP or DBE
requirement?:

Does this solicitation contain No
a Veteran requirement?

Relevant Category: General Services

Length of Renewal Term: 6
Contract Begin Date: 12/01/2015
Contract End Date: 05/31/2016
Remaining Renewal Terms: 1

Contract Renewal

Cost of Initial Term: \$675,000.00 (Total Dollar Amount of Initial Term)
Cost of this Renewal: \$225,000.00 (Total Dollar Amount of Renewal)
Renewal Increase/Decrease: 0.00
Change in Specifications: No
Renewal Number: 1 of 2

Vendor(s) Selected for Award

Vendor Name	Amount of Award	BEP Goal	% DBE Goal
<u>COLUMBIA CAPITAL MANAGEMENT LLC</u>	\$75,000.00	0%	0%
<u>A. C. ADVISORY, INC.</u>	\$75,000.00	0%	0%
<u>ACACIA FINANCIAL GROUP INC</u>	\$75,000.00	0%	0%

Notice Contact

Name: Desiree Liberti
Street Address: 2700 Ogden Ave
City: Downers Grove
State: IL
Zip Code: 60515
Phone: 630-241-6800
Fax Number: 630-505-9270
EMail Address: Desiree.Liberti@getipass.com

Class Code

Class Codes:

NIGP Code

NIGP Commodity/Service Code: 946 48 Financial Advisor

Notify Type: Send email to selected Class Codes only

Attachments

To download file(s), click on filename(s) located below. Not all Notice Addendums will have files to download.

File Attachments:

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Vendor Award Information

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Created Date: 12/03/2015
Created By: Liza Reambillo

Identification

Reference Number: 22037366
Title: THA - 12-0161 Financial Advisory Services

Vendor Selected for Award

Vendor Name: ACACIA FINANCIAL GROUP INC
Vendor Contact Name: KIM M. WHELAN
Vendor Street: 221 N LASALLE ST SUITE 1500
Address:
Vendor City: CHICAGO
Vendor State: IL
Vendor Zip Code: 60601
Vendor Phone: 312-269-0041
Number:
Vendor Fax Number: 312-236-1407

Key Information

Amount of Award: \$75,000.00 (Total Dollar Value Only)
Amount of: \$0.00 (Dollar Value Only)
Increase/Decrease:
Indicate Increase or: No Change
Decrease:
Renewal Options: 1 of 2
BEP Goal Amount: 0.00%
(Percentage):
DBE Goal Amount: 0.00%
(Percentage):
Will Sub-Contractors: No
Be Utilized?

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Vendor Award Information

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Vendor Selected for Award

Vendor Name: A. C. ADVISORY, INC.
Vendor Contact Name: ADELA CEPEDA
Vendor Street: 150 N N WACKER DRIVE SUITE 2160
Address:
Vendor City: CHICAGO
Vendor State: IL
Vendor Zip Code: 60606
Vendor Phone: 312-346-0154
Number:
Vendor Fax Number: 312-346-0215

Key Information

Amount of Award: \$75,000.00 (Total Dollar Value Only)
Amount of: \$0.00 (Dollar Value Only)
Increase/Decrease:
Indicate Increase or: No Change
Decrease:
Renewal Options: 1 of 2
BEP Goal Amount: 0.00%
(Percentage):
DBE Goal Amount: 0.00%
(Percentage):
Will Sub-Contractors: No
Be Utilized?

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Vendor Award Information

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Identification

Reference Number: 22037366
Title: THA - 12-0161 Financial Advisory Services

Vendor Selected for Award

Vendor Name: COLUMBIA CAPITAL MANAGEMENT LLC
Vendor Contact Name: DENNIS LLOYD
Vendor Street: 6330 LAMAR AVE SUITE 200
Address:
Vendor City: OVERLAND PARK
Vendor State: KS
Vendor Zip Code: 66202
Vendor Phone: 913-248-8500
Number:
Vendor Fax Number: 913-248-8900

Key Information

Amount of Award: \$75,000.00 (Total Dollar Value Only)
Amount of: \$0.00 (Dollar Value Only)
Increase/Decrease:
Indicate Increase or Decrease: No Change
Renewal Options: 1 of 2
BEP Goal Amount (Percentage): 0.00%
DBE Goal Amount (Percentage): 0.00%
Will Sub-Contractors Be Utilized? No