

# Notice Addendum



## Identification

Reference Number:	22024004
Title:	THA - 12-0045 Bond Underwriting and Remarketing Services
Agency Reference Number:	THA - 12-000000065573
Agency:	THA - Toll Highway Authority
Purchasing Agency:	THA - Toll Highway Authority
Purchasing Agency SPO:	Kellye Keyes
Date First Offered	05/03/2012
Status:	Published

## Overview

Description and Specifications:  
 Notoice Addendum 3 is being issued to list the name of the remaining Senior Manager.

The total dollar amount of award is \$665,000.00

In addition, the final awarded vendor pool is 31 (Senior/Co-Manager).

The contract start and end dates are estimated and will begin upon execution of the contract.

## Key Information

Notice Type:	Contract Award Notice
Does this addendum add/or change vendor(s) information? (i.e. vendor name/address, contact information, and/or award amount, etc.)?	Yes
Published:	06/12/2014
Notice Expiration Date:	06/26/2014
Professional & Artistic:	Yes
Small Business Set-Aside:	No

Does this solicitation contain No  
a BEP or DBE requirement?:

Does this solicitation contain No  
a Veteran requirement?

Relevant Category: General Services

Total Amount of Award: \$665,000.00 (Total Dollar Value Only/Includes Any Renewal  
Options)

Estimated/Actual Value  
Description:

Length of Initial Term: 18  
Contract Begin Date: 07/01/2014  
Contract End Date: 12/31/2015  
Renewal Terms: 2 years

### **Bidder(s)**

---

Number of Responding Bidders: 51  
Number of Unsuccessful 19  
Responsive Bidders:  
Total Number Awarded: 31

Listing of All Bidders/Offerors Considered But Not Selected:

1. Academy Securities
2. Backstrom McCarley Berry & Co LLC
3. Blaylock Robert Van LLC
4. CastelOak Securities L. P.
5. City Securities Corp
6. Drexel Hamilton
7. Edward Jones
8. Estrada Hinojosa & Co Inc.
9. Great Pacific Securities
10. Incapital LLC
11. Lebenthal & Company., LLC
12. Mischler Financial Group
13. North South Capital
14. Northern Trust
15. Podesta & Co
16. Rockfleet Financial Services
17. Stern Brothers & Co
18. Sterneagee & Leach, Inc.
19. Valdes Moreno Inc

Source Selection: RFP

**Vendor(s) Selected for Award**

Vendor Name	Amount of Award	BEP Goal %	DBE Goal %
<a href="#">William Blair &amp; Company, L.L.C.</a>	\$665,000.00	0%	0%

**Notice Contact**

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

**Class Code**

Class Codes: S240 Financial Services & Credit Reporting Services

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:

[◀ Back](#)

## Vendor Award Information

[Help](#)

---

Created Date: 06/12/2014  
Created By: Julia Shaw

### Identification

---

Reference Number: 22024004  
Title: THA - 12-0045 Bond Underwriting and Remarketing Services

### Vendor Selected for Award

---

Vendor Name: William Blair & Company, L.L.C.  
Vendor Contact Name: Thomas E. Lanctot  
Vendor Street Address: 222 West Adams Street  
Vendor City: Chicago  
Vendor State: IL  
Vendor Zip Code: 60606  
Vendor Phone Number: 312.364.8120  
Vendor Fax Number: 312.236.0174

### Key Information

---

Amount of Award: \$665,000.00 (Total Dollar Value Only)  
Cost of Initial Term: \$400,000.00 (Total Dollar Amount of Initial Term)  
Cost of Renewals: \$265,000.00 (Total Dollar Amount of Renewals)  
BEP Goal Amount (Percentage): 0.00%  
DBE Goal Amount (Percentage): 0.00%  
Will Sub-Contractors Be Utilized? No