

Justin S. Greene
Commissioner, District 1

Lisa Cacari Stone
Commissioner, District 2

Camilla Bustamante
Commissioner, District 3



Adam Fulton Johnson
Commissioner, District 4

Hank Hughes
Commissioner, District 5

Gregory S. Shaffer
County Manager

March 4, 2026

SANTA FE COUNTY
RFP No. 2026-0222-FIN/JP
FINANCIAL ADVISOR SERVICES
ADDENDUM NO. 1

Dear Proponents,

This addendum is issued to reflect the following immediately. It shall be the responsibility of interested Offerors to adhere to any changes or revisions to the RFP as identified in this Addendum No.1. This documentation shall become permanent and made part of the departmental files.

Attachment A: Pre-Proposal Agenda and Sign-In Sheet

Question No. 1: Section D (Qualifications) states that the Offeror must be a New Mexico licensed investment advertiser/broker and must maintain such licensure throughout the project. Could you confirm whether this requirement applies to this solicitation?

Answer No. 1: No, this requirement does not apply to this solicitation.

Please add this Addendum No. 1 to the original proposal documents and refer to proposal documents, as such. This and all subsequent addenda will become part of any resulting contract documents and have effects as if original issued. All other unaffected sections will have their original interpretation and remain in full force and effect. Responders are reminded that any questions or need for clarification must be addressed to John Anthony Peperas, Procurement Specialist Senior at jpeperas@santafecountynm.gov.



PRE-PROPOSAL CONFERENCE
RFP No. 2026-0222-FIN/JP
Financial Advisor Services
February 24, 2026 at 10:00AM

Contracting Agency: Santa Fe County

- | | | |
|----------------------------|-------------------------------|---------------------|
| • John Anthony Peperas | Procurement Specialist Senior | Purchasing Division |
| • Yvonne Herrera | Finance Director | Finance Division |
| • Bill Taylor | Procurement Manager | Purchasing Division |
| • Amanda Patterson-Sanchez | Procurement Planner Analyst | Purchasing Division |

Project Information

Santa Fe County Finance Department is requesting proposals to procure financial advisor services. The services include working with County officials and bond counsel to provide information appropriate to bond rating agencies, conduct a survey of the financial resources of the County to determine the extent of its capacity to authorize, issue and service debt.

Proposal Information

- Carefully read the Request for Proposal for requirements, terms & conditions including the sample contract.
- Sequence of Events are listed on page 11.
- Proposal Organization – Proposal should be organized as outlined in the RFP on page 21.
- Selection of finalist(s) – the most qualified proposal received based on the evaluation factors outlined in the RFP (pages 23-24) will be scored by a three to four-member evaluation committee.
- Preferences -
 - 1) N.M. In-State Resident/Native American In-State Preference Certificate 80 points total of all evaluation factors added to score.

OR

 - 2) N.M. Resident/Native American Veterans Preference Certificate, 100 points total of all evaluation factors added to score or Native American Preference. For more information on State Preference visit www.tax.newmexico.gov

AND

 - 3) Santa Fe County Preference, 50 points total of all evaluation factors added to score. For more information on County Preference visit <https://www.santafecountynm.gov/finance/purchasing-division/current-bid-solicitations>
- Please submit all questions via email to John Peperas at jpeperas@santafecountynm.gov. The last day for questions will be **Thursday, February 26, 2026**. (*Any contact with any other County staff member or persons other than the Procurement Specialist Senior may be grounds for disqualification.*)

- Addendum will be issued on **Wednesday, March 4, 2026**. (*Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarifications will be without legal effect.*)

- **Proposal Submittal Due Date:**

Due Date: Wednesday, March 18, 2026

Time: 2:00 PM

Electronic submission via Dropbox utilizing Dropbox link:

<https://www.dropbox.com/request/DfyBKKAwLBMQOfVrs3a>



SANTA FE COUNTY

**PRE-PROPOSAL CONFERENCE
RFP No. 2026-0222-FIN/JP
Financial Advisor Services
February 24, 2026 AT 10:00 AM**

NAME	COMPANY	TELEPHONE	E-MAIL ADDRESS
John Peperas	SFC Purchasing Procurement Specialist Senior	505-986-6218	jpeperas@santafecountynm.gov
Bill Taylor	SFC Purchasing Procurement Manager	505-986-6373	wtaylor@santafecountynm.gov
Amanda Patterson-Sanchez	SFC Purchasing Procurement Planner	505-992-6753	apatterson-sanchez@santafecountynm.gov
Erik Harrigan	RBC Capital Markets LLC Managing Director	505-872-5992	erik.harrigan@rbccm.com