COUNTY OF ALAMEDA

Bidders Conference Attendees List

to

RFP No. 902113

### for

**Deferred Compensation Plan Investment Advisory Services**

**Networking/Bidders Conference Held May 10, 2022**

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| **This County of Alameda, General Services Agency (GSA), RFP Bidders Conference Attendees List has been electronically issued to potential bidders via e-mail. E-mail addresses used are those in the County’s Small Local Emerging Business (SLEB) Vendor Database or from other sources. If you have registered or are certified as a SLEB, please ensure that the complete and accurate e-mail address is noted and kept updated in the SLEB Vendor Database. This RFP Bidders Conference Attendees List will also be posted on the GSA Contracting Opportunities website located at** [**Alameda County Current Contracting Opportunities**](https://gsa.acgov.org/do-business-with-us/contracting-opportunities/)**.** |

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The following participants attended the Bidders Conference:

|  | **Company Name / Address** | **Representative** | **Contact Information** |
| --- | --- | --- | --- |
|  | **AndCo Consulting**  **5470 Kietzke Lane, Suite 304**  **Reno, NV** | **Mike Fleiner** | Phone: (775) 335-0552 |
| E-Mail: mikef@andcoconsulting.com |
| Prime Contractor: Yes |
| Subcontractor: |
| Certified SLEB: No |
|  | **AndCo Consulting**  **5470 Kietzke Lane, Suite 304**  **Reno, NV** | **Joe Carter** | Phone: (775) 335-0553 |
| E-Mail: joec@andcoconsulting.com |
| Prime Contractor: Yes |
| Subcontractor: |
| Certified SLEB: No |
|  | **Belpointe Wealth** | **Ken Quiat and Tony Fernandes** | Phone: (415) 659-8430 |
| E-Mail: ken.quiat@belpointewealth.com |
| Prime Contractor: |
| Subcontractor: |
| Certified SLEB: |
|  | **Global Investment Company** | **Cathy Jackson** | Phone: |
| E-Mail: |
| Prime Contractor: |
| Subcontractor: |
| Certified SLEB: |
|  | **HyasGroup**  **Portland, OR** | **Ted Grigsby** | Phone: |
| E-Mail: |
| Prime Contractor: Yes |
| Subcontractor: |
| Certified SLEB: |
|  | **Innovest**  **7979 E. Tufts Ave., #1700**  **Denver, CO 90237** | **Paul Nacario** | Phone: (480) 250-0268 |
| E-Mail: pnacario@innovestinc.com |
| Prime Contractor: Yes |
| Subcontractor: |
| Certified SLEB: |
|  | **NEPC, LLC**  **10 S. Wacker Drive, Suite 1230**  **Chicago, IL 60606** | **Bill Ryan** | Phone: (949) 500-2731 |
| E-Mail: bryan@nepc.com |
| Prime Contractor: Yes |
| Subcontractor: |
| Certified SLEB: |
|  |  |  |  |
|  | **Retirement Plan Advisors, LLC** | **Zach Karas** | Phone: |
| E-Mail: |
| Prime Contractor: Yes |
| Subcontractor: |
| Certified SLEB: |
|  | **Retirement Plan Advisors, LLC** | **Josh Schwartz** | Phone: |
| E-Mail: |
| Prime Contractor: |
| Subcontractor: |
| Certified SLEB: |
|  | **Walsh Financial Consulting**  **10732 Fallbrook Way**  **Oakland, CA 94605** | **Mark Walsh** | Phone: (510) 457-8742 |
| E-Mail: mark@walshfc.com |
| Prime Contractor: |
| Subcontractor: Yes |
| Certified SLEB: Yes |
|  | **Wilshire**  **1299 Ocean Ave., Suite 700**  **Santa Monica, CA 90401** | **Carolyn Gilbert** | Phone: (630) 464-0456 |
| E-Mail: cgilbert@wilshire.com |
| Prime Contractor: Yes |
| Subcontractor: |
| Certified SLEB: |
|  |  | **Nancy Arias** | Phone: |
| E-Mail: |
| Prime Contractor: |
| Subcontractor: |
| Certified SLEB: |
|  |  | **Christine Hedek** | Phone: |
| E-Mail: |
| Prime Contractor: |
| Subcontractor: |
| Certified SLEB: |
|  |  | **Julie Klassen** | Phone: |
| E-Mail: |
| Prime Contractor: |
| Subcontractor: |
| Certified SLEB: |
|  |  | **Julia Kod** | Phone: |
| E-Mail: |
| Prime Contractor: |
| Subcontractor: |
| Certified SLEB: |
|  |  | **Victor Lee** | Phone: |
| E-Mail: |
| Prime Contractor: Yes |
| Subcontractor: |
| Certified SLEB: |
|  |  | **Laura Waters** | Phone: |
| E-Mail: |
| Prime Contractor: |
| Subcontractor: |
| Certified SLEB: |
|  |  | **Alan Wilcox** | Phone: |
| E-Mail: |
| Prime Contractor: |
| Subcontractor: |
| Certified SLEB: |

VENDOR BID LIST

**RFP No. 902113 – Deferred Compensation Plan Investment Advisory Services**

This Vendor Bid List is being provided for informational purposes to assist bidders in making contact with other businesses as needed to develop local small and emerging business subcontracting relationships to meet the requirements of the Small Local Emerging Business (SLEB) Program: [Small Local Emerging Business (SLEB) Program](https://gsa.acgov.org/do-business-with-us/vendor-support/small-local-and-emerging-businesses/).

This Attendees List is being issued to all vendors on the Vendor Bid List; the following revised vendor bid list includes contact information for each vendor attendee at the Networking/Bidders Conferences.

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| --- | --- | --- | --- | --- | --- | --- |
| **RFP No. 902113 - Deferred Compensation Plan Investment Advisory Services** | | | | | | |
| **Business Name** | **Contact Name** | **Contact Phone** | **Address** | **City** | **State** | **Email** |
| 280 Securities LLC | Michael Hurtado | 628/231-2564 | 575 Market Street | San Francisco |  | mhurtado@280securities.com |
| 280 Securities LLC | Tom Lockard | 628/231-2327 | 575 Market Street | San Francisco |  | tlockard@280securities.com |
| Alamo Capital | Jerry Liang | 925/956-0127 | 201 N. Civic Drive | Walnut Creek |  | jliang@alamocapital.com |
| Alan Biller and Associates, Inc. | Alan D. Biller | (650) 328-7283 | 535 Middlefield Road, Suite 230 | Menlo Park | CA | [alan@alanbiller.com](mailto:alan@alanbiller.com) |
| American Beacon Advisors | Leslie Spencer | (817) 931-3800 | 4151 Amon Carter Blvd., MD 2450 | Forth Worth | TX | [leslie.spencer@ambeacon.com](mailto:leslie.spencer@ambeacon.com) |
| AndCo Consulting | Mike Fleiner | (775) 335-0552 | 5470 Kietzke Lane, Suite 304 | Reno | NV | mikef@andcoconsulting.com |
| AndCo Consulting | Joe Carter | (775) 335-0553 | 5470 Kietzke Lane, Suite 304 | Reno | NV | joec@andcoconsulting.com |
| Backstrom McCarley Berry & Co. LLC | Leonard Berry | (415) 392-5505 | 7770 Pardee Ln., Suite 200-D | OAKLAND |  | lberry@bmcbco.com |
| Backstrom McCarley Berry & Co., LLC | Pharris Langston | 415/392-5505 | 115 Sansome St., Mez A | San Francisco |  | plangston@bmcbco.com |
| Bellwether Consulting | Keith Hocter | (646) 205-9346 | PO Box 31 | Millburn | NJ | [keith.hocter@bellwetherconsulting.net](mailto:keith.hocter@bellwetherconsulting.net) |
| Belpointe Wealth | Ken Quiat | (415) 659-8430 |  |  |  | ken.quiat@belpointewealth.com |
| Blaylock Van, LLC | Tarrell Gamble | (510) 208-6101 | 350 Frank H Ogawa Plaza, 10th Floor | OAKLAND |  | tgamble@brv-llc.com |
| Bolton Partners Investment | Michael Beczkowski | (443) 573-3901 | 100 Light St., 9th Fl. | Baltimore | MD | mbeczkowski@boltonpartners.com |
| Buck Consultants | Alan Vorchheimer | (212) 330-1302 | 1 Pennsylvania Plaza | New York | NY | Alan.Vorchheimer@buckconsultants.com |
| Buck Global Investment Advisors | Jon Slinger | (720) 359-7736 | 1200 17th Street Suite 1200 | Denver | CO | [jon.slinger@buckconsultants.com](mailto:jon.slinger@buckconsultants.com) |
| Callan Associates | Greg T. Ungerman | (415) 974-5060 | 101 California Street, Suite 3500 | San Francisco | CA | [ungerman@callan.com](mailto:ungerman@callan.com) |
| Cammack Retirement Group | Jeffrey Snyder | 646 839 8254 | 40 Wall Street | New York | NY | jsnyder@cammackretirement.com |
| CAPTRUST Financial Advisors | Mark A. Davis | (818) 483-1590 | 2629 Townsgate Road, Suite 250 | Westlake Village | CA | [Mark.Davis@Captrustadvisors.com](mailto:Mark.Davis@Captrustadvisors.com) |
| Chandler Asset Management, Inc. | Carlos Oblites | 415/798-5586 | 6225 Lusk Boulevard | San Diego |  | coblites@chandlerasset.com |
| Chandler Asset Management, Inc. | Martin Cassell | 858/546-3737 | 6225 Lusk Boulevard | San Diego |  | mcassell@chandlerasset.com |
| Chandler Asset Management, Inc. | Candice Sharar | 800/317-4747 | 6225 Lusk Boulevard | San Diego |  | csharar@chandlerasset.com |
| Dennis Goins & Associates | Dennis Goins | (925) 776-4911 | 1255 Treat Blvd., Ste. 300 | Walnut Creek | CA | dennis@dennisgoins.com |
| Direct Lenders' Insurance Services | Tony Fernandes | (415) 654-9843 | 4900 Hopyard Rd., Ste 100, Room 47 | PLEASANTON |  | tony@directlendersins.com |
| Emerge Financial Group | Keith Towns | (510) 562-6355 | 7677 Oakport Street, Suite 1060 | OAKLAND |  | k.towns@emergefinancial.com |
| Fiduciary Experts LLC | Maribel Larios | 951/256-6015 | 29250 Wrangler Dr | Murrieta |  | Mari@401kfe.com |
| First Southwest Company, LLC | Vickie Hall | 214.953.8874 | 325 North St. Paul | Dallas |  | vickie.hall@firstsw.com |
| FTN Financial Main Street Advisors, LLC | Ruth Phillips | 702/575-6600 | 10655 Park Run Drive | Las Vegas |  | ruth.phillips@ftnmainstreet.com |
| Global Investment Company | Cathy Jackson | (510) 835-8300 | 300 Frank H Ogawa Plaza, Suite 254 | OAKLAND |  | cathy@globalinvestmentcompanies.com |
| Global Investment Co | Cathy Gent | 510-835-8300 | 300 Frank H Ogawa #254 | Oakland | CA | cathy@globalinvestmentcompanies.com |
| Group Retirement Plans | Zachary J. Karas | (312) 701-1100 | 39 Smallwood Road | West Hartford | CT | [zkaras@retirementplanadvisors.com](mailto:zkaras@retirementplanadvisors.com) |
| Hyas Group | Greg Settle | (971) 634-1501 | 108 NW 9th Ave., Ste. 203 | Portland | OR | Gsettle@hyasgroup.com |
| Innovest Portfolio Solutions | Becca Ellis | 303-301-5877 | 4643 South Ulster Street, Suite 1040 | Denver | CO | bellis@innovestinc.com |
| Innovest Portfolio Solutions | Paul Nacario | (480) 250-0268 | 7979 E. Tufts Ave., #1700 | Denver | CO | pnacario@innovestinc.com |
| Jefferies LLC | Samuel Smalls | 916/449-9935 | 980 Ninth Street | Sacramento |  | ssmalls@jefferies.com |
| Loop Capital Markets LLC | Tarun Anjan | 310.442.1200 | 12100 Wilshire Blvd., Suite 605 | Los Angeles |  | tarun.anjan@loopcapital.com |
| Loop Capital Markets LLC | Joyce David | 312.913.2264 | 12100 Wilshire Blvd., Suite 605 | Los Angeles |  | joyce.davis@loopcapital.com |
| Metis Retirement Plan | Martin B. Walton | (916) 221-8075 | 2844 King Edward Dr. | El Dorado Hills | CA | walton.metis@gmail.com |
| Multnomah Group | Brian A. Montanez | (510) 654-7240 | 1057 Trestle Glen Road | Oakland | CA | [brian.montanez@multnomahgroup.com](mailto:brian.montanez@multnomahgroup.com) |
| NEPC, LLC | Bill Ryan | (949) 500-2731 | 10 S. Wacker Drive, Suite 1230 | Chicago | IL | bryan@nepc.com |
| Nor-Cal Financial Development Corporatio | Arthur Washington | 510/325-7441 | 300 Frank H. Ogawa Plaza | Oakland |  | awashington@nor-calfdc.org |
| Northwest Capital Mgmt | Brent Petty | (503) 597-1641 | 12511 SW 68th Ave. | Portland | OR | brent.petty@NWCapital.com |
| PF Wealth Management Grp., LLC | Frank Pare | (510) 986-0598 | 1999 Harrison St., Suite 1650 | OAKLAND |  | frank@pfwealthgroup.com |
| Public Resources Advisory Group | Jocelyn Mortensen | 510/339-3212 | 1950 Mountain Boulevard | Oakland |  | jmortensen@pragadvisors.com |
| Raymond James & Associates, Inc. | Emily Giles | 415/616-8923 | 880 Carillon Parkway | St Petersburg |  | emily.giles@raymondjames.com |
| Retirement Plan Advisors, LLC | Zachary Karas | 860/521-0605 | 105 W. Adams Street | Chicago |  | zkaras@retirementplanadvisors.com |
| RVK, Inc | Gayle Butcher | 503-802-6130 | 1211 SW 5th Avenue | Portland | OR | gayle.butcher@rvkinc.com |
| Segal | Wendy Carter | 202-525-8637 | 1920 N Street NW, Suite 400 | Washington | DC | wcarter@segalco.com |
| Segal Advisors, Inc. | Weslee M. Damiano | (212) 251-5226 | 333 West 34th Street | New York | NY | [wdamiano@segaladvisors.com](mailto:wdamiano@segaladvisors.com) |
| Siebert Brandford Shank & Co. | Napoleon Brandford | (510) 645-2245 | 1999 Harrison Street, Suite 2720 | OAKLAND |  | nbrandford@sbsco.com |
| SST Benefits Consulting | Bill Tugaw | (916) 270-2020 | 4364 Town Center Blvd, Suite 315 | El Dorado Hills | CA | [billtugaw@sstbenefits.com](mailto:billtugaw@sstbenefits.com) |
| TKG & Associates, LLC | Charlotte Knight Marshall | 713/778-1707 | 8700 Commerce Park Dr. | Houston |  | info@tkgadvisors.net |
| U.S. Bank | Carolyn Cox | (415) 273-5243 | 1 California St. | San Francisco | CA | carolyn.cox@usbank.com |
| US Bancorp Investments, Inc | Esther Berg | 415/677-3688 | 1 California St, Ste 350 | San Francisco |  | esther.berg@usbank.com |
| VALIC Retirement Services Company, Inc. | Tom Goodwin | 713 831 4336 | 2919 Allen Parkway | Houston |  | Tom.Goodwin@aig.com |
| Verity Asset Management | Michael DeCamillis | (919) 490-6717 | 280 South Mangum Street, #550 Diamond View II | Durham | NC | [mdecamillis@verityinvest.com](mailto:mdecamillis@verityinvest.com) |
| Walsh Financial Consulting | Mark Walsh | (510) 457-8742 | 10732 Fallbrook Way | Oakland | CA | mark@walshfc.com |
| Watson Wyatt Investment Consulting | Scott A. Faris | (503) 598-4441 | 5335 Meadows Road, S.W. Suite 200 | Lake Oswego | OR | [scott.faris@watsonwyatt.com](mailto:scott.faris@watsonwyatt.com) |
| Wilkinson Wealth Management | Steven Wilkinson | ( 510 ) 625-1400 | 300 Frank H Ogawa Plaza, Suite 252 | OAKLAND | CA | Steve@Stevewilkinson.com |
| Wilshire | Carolyn Gilbert Pejsa | (630) 464-0456 | 1299 Ocean Ave., Suite 700 | Santa Monica | CA | cgilbert@wilshire.com |