

**MEDFORD WATER COMMISSION
REQUEST FOR PROPOSALS
NON-DISCRETIONARY INVESTMENT ADVISORY SERVICES**

Updated 4/18/2018

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PLAN HOLDER #	DATE	CONTRACTOR NAME/ADDRESS	PHONE # / EMAIL	PREQUALIFIED?	METHOD OF PAYMENT
1.	4/3/18	TESSA DELINE, FINANCE DIRECTOR MEDFORD WATER COMMISSION 200 S IVY ST – ROOM 177 MEDFORD OR 97501	(541) 774-2454 tessa.deline@cityofmedford.org	N/A	N/A
2.	4/3/18	WHITNEY MAHER GOVERNMENT PORTFOLIO ADVISORS	(503) 248-9973 whitney@gpafixedincome.com	N/A	N/A
3.	4/4/18	US BANCORP INVESTMENTS, INC.	(541) 776-2685 adrian.snyder@usbank.com	N/A	N/A
4.	4/4/18	ALLSTATE FINANCIAL SERVICES, LLC	(541) 773-4343 rogerescobar@allstate.com	N/A	N/A
5.	4/4/18	AMERITAS INVESTMENT CORP.	(800) 311-7871	N/A	N/A
6.	4/4/18	CENTAURUS FINANCIAL, INC.	(541) 245-4068	N/A	N/A
7.	4/4/18	COUNTRY CAPITAL MANAGEMENT CO.	(309) 821-5228	N/A	N/A
8.	4/4/18	JP MORGAN SECURITIES, LLC.	(541) 776-3333	N/A	N/A
9.	4/4/18	JONES & ASSOCIATES PREMIER FINANCIAL SOLUTIONS, LLC	(541) 773-9567	N/A	N/A
10.	4/4/18	KEY INVESTMENT SERVICES, LLC	(888) 539-4249	N/A	N/A

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11.	4/4/18	LPL FINANCIAL, LLC	(541) 618-0692	N/A	N/A
12.	4/4/18	MORGAN STANLEY SMITH BARNEY, LLC	(541) 779-5010	N/A	N/A
13.	4/4/18	OREGON PACIFIC FINANCIAL ADVISORS, INC.	(541) 772-1116	N/A	N/A
14.	4/4/18	PFS INVESTMENTS, INC.	(541) 779-3505	N/A	N/A
15.	4/4/18	SKYOAK WEALTH MANAGEMENT, INC.	(541) 779-4446	N/A	N/A
16.	4/4/18	AE WEALTH MANAGEMENT	(866) 363-9595	N/A	N/A