

FAUQUIER COUNTY GOVERNMENT AND PUBLIC SCHOOLS
PROCUREMENT DIVISION

320 Hospital Drive Ste. 23
Warrenton, Virginia 20186

Phone: 540.422-8348

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NOTICE OF CONTRACT RENEWAL

DATE: May 19, 2016

COMMODITY NAME: 403/457B Advisory & Consulting Services

CONTRACT NUMBER: 71-11smc

SUPERCEDES: 66-09smc, Rider w/City of Charlottesville

CONTRACT PERIOD: July 1, 2016 through June 30, 2017

RENEWALS: One (1) one-year renewal option remains

CONTRACTOR: CapFinancial Partners, LLC d/b/a
VN 643275 CapTrust Financial Advisors
4208 Six Forks Road, Suite 1700
Raleigh, NC 27609
Phone: 804-672-4501
Fax: 804-672-4515
Email: barry.schmitt@CapTrustAdvisors.com

TERMS: Net 45 days

DELIVERY: N/A

FOR FURTHER INFORMATION CONTACT: Susan R. Monaco, CPPO, CPPB
Procurement Manager
Phone: 540.422-8348

NOTICE TO ALL FAUQUIER COUNTY GOVERNMENT AND PUBLIC SCHOOL USING DEPARTMENTS: This contract is the result of a competitive bid program and its use must follow the FCG&PS Procurement Policy/Procedures for the purchase of the commodity listed herein. Please see the reverse side of this notice for further instructions regarding this contract.

INSTRUCTIONS

1. **Orders:** All FCG&PS Using Departments must order services listed by issuing FCG&PS Purchase Orders per FCG&PS Procurement Procedures Manual. An extra copy of the Procedures Manual can be obtained by calling Procurement at (540) 422-8351 or 8352.
2. The applicable contract number, vendor number, estimated total dollar amount (can be done as a “Not to exceed” estimated figure), contact person with phone number, and billing/delivery address must be shown on each purchase order for Finance & Contractor use.
3. Verification of services and approval of contractor’s invoice is the responsibility of the receiving using department.
4. Any complaint as to quality of services, faulty or delinquent delivery, or violation of contract provisions by contractor shall be reported to FCG&PS Procurement for handling with the Contractor. All complaints must be submitted in writing and can be forwarded to Procurement via fax or courier.
5. **Renewals:** As stated on the face of this notice, one (1) one-year renewals remain on this contract. The contract will be renewed by mutual agreement of both parties, approximately ninety days prior to expiration of the current contract term, with input and approval from the Human Resources Department.
6. **Compensation: Contract fee is a negotiated, fixed \$ 32,500 per year for all years of the contract.**
7. **Use of Contract by Other Political Jurisdictions:** This clause is contained in RFP#71-11sm, which became the contract. This contract may therefore be extended to Northern Virginia, Metropolitan Washington Council of Governments jurisdictions and other jurisdictions and Political Subdivisions of the Commonwealth of Virginia with the authorization of the Consultant. FCG&PS acts only as the “Contracting Agent” for these jurisdictions and political subdivisions. Given the nature of the fixed, negotiated fee for all years of the contract, any jurisdiction interested in riding this contract must contact CapTrust directly to see if they are willing to extend the pricing based on the original Statement of Needs and final negotiated fee schedule.