

Contract Renewal Evaluation Form

Date:	October 24, 2025
Department:	Finance
Contract Number:	24 REP1337774C-MH
Contract Title:	Financial Advisory Services

Instructions:

It is extremely important that every contract be rigidly scrutinized to determine if the contract provides the County with value. Each renewal shall be reviewed and answers provided to determine whether services should be maintained, services/scope reduced, services brought in-house or if the contract should be terminated. Please submit a completed copy of this form with all renewal requests.

1. Describe what efforts were made to reduce the scope and cost of this contract.

The contract was awarded through the Fulton County competitive bid process.

2. Describe the analysis you made to determine if the current prices for this good or service is reflective of the current market. Check all applicable statements and provide documentation:

Pricing and scope were vetted through a competitive bid process to ensure fair market value and that the scope and delivery of service would meet the County's need.

☐ Internet search of pricing for same product or service:

Date of search:	Click here to enter a date.
Price found:	Click here to enter text.
Different features / Conditions:	Click here to enter text.
Percent difference between internet price and renewal price:	Click here to enter text.

Explanation / Notes:

Each governmental entity has unique characteristics which affect the fees bid by external CPA firms. Larger counties with a broad scope of activities require more effort on the part of external auditors, which in turn yield larger audit fees. CPA firms do not quote rates on the internet.

☐ Market Survey of other jurisdictions:

Date contacted:	Click here to enter a date.
Jurisdiction Name / Contact name:	Click here to enter text.
Date of last purchase:	Click here to enter a date.
Price paid:	Click here to enter text.

Inflation rate:	Click here to enter text.
Adjusted price:	Click here to enter text.
Percent difference between past purchase price and renewal price:	Click here to enter text.
Are they aware of any new vendors?	☐ Yes ☐ No
Are they aware of a reduction in pricing in this industry?	☐ Yes ☐ No
How does pricing compare to Fulton County's award contract?	Click here to enter text.

Explanation / Notes

The County is expected to spend the full contract amount for these services in 2025 of \$217,000

☐ Other (Describe in detail the analysis conducted and the outcome)

[Click here to enter text.](#)

3. What was the actual expenditure (from the AMS system) spent for this contract for previous fiscal year?

\$197,550 as of October 24, 2025 spent in 2025. The full contract amount of \$217,000 is expected to be paid by 12/31/25.

4. Does the renewal option include an adjustment for inflation? ☒ Yes ☐ No
(Information can be obtained from CPI index)

Was it part of the initial contract? ☒ Yes ☐ No

Date of last purchase:	2025
Price paid:	217,000
Inflation rate:	Click here to enter text.
Adjusted price:	
Percent difference between past purchase price and renewal price:	%

Explanation / Notes:

[Click here to enter text.](#)

5. Is this a seasonal item or service? ☐ Yes ☒ No
6. Has an analysis been conducted to determine if this service can be performed in-house? ☐ Yes ☒ No If yes, attach the analysis.
7. What would be the impact on your department if this contract was not approved?

Another investment advisor would have to be selected via procurement, delaying our required timetable For an annual audit as required by O.C.G.A. 36-81-7.