



CENTRALBIDDING
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**SOQ 23-003 Underwriter/ Placement Agent for the Jefferson Parish
Department of Finance relative to the Issuance of bonds/notes and for
Assistance with Other Various Refunding Opportunities
Jefferson Parish Government**

Project documents obtained from www.CentralBidding.com

01-Mar-2023 09:37:30 AM

General Professional Services Questionnaire Instructions

- The General Professional Services Questionnaire shall be used for all professional services except outside legal services and architecture, engineering, or survey projects.
- **The General Professional Services Questionnaire should be completely filled out. Complete and attach ALL sections. Insert “N/A” or “None” if a section does not apply or if there is no information to provide.**
- Questionnaire must be signed by an authorized representative of the Firm. Failure to sign the questionnaire shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- All subcontractors must be listed in the appropriate section of the Questionnaire. Each subcontractor must provide a complete copy of the General Professional Services Questionnaire, applicable licenses, and any other information required by the advertisement. Failure to provide the subcontractors' complete questionnaire(s), applicable licenses, and any other information required by the advertisement shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- If additional pages are needed, attach them to the questionnaire and include all applicable information that is required by the questionnaire.

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

SOQ# 23-003 - Underwriter /Placement Agent for Jefferson Parish Department of Finance
Resolution No. 141132

B. Firm Name & Address:

Crews & Associates, Inc.
521 President Clinton Avenue, Suite 800
Little Rock, AR 72201

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Michael Lambert
Senior Managing Director - Head of National Public Finance
501.978.7946
mlambert@crewsfs.com

D. Address of principal office where Project work will be performed:

521 President Clinton Avenue, Suite 800
Little Rock, AR 72201

E. Is this submittal by a JOINT-VENTURE? Please check:

YES _____ NO X

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.

1.

2.

General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES _____ NO _____

H. List all subcontractors anticipated for this Project. Please note that all subcontractors must submit a fully completed copy of this questionnaire, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.

Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. NA	NA	NA
2.		
3.		
4.		
5.		

General Professional Services Questionnaire

I. Please specify the total number of support personnel that may assist in the completion of this Project: <div style="text-align: center; margin-top: 5px;">5</div>
J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.
PROFESSIONAL NO. 1
Name & Title:
Michael Lambert, Senior Managing Director Head of National Public Finance
Name of Firm with which associated:
Crews & Associates, Inc.
Description of job responsibilities:
Michael will serve as lead banker.
Years' experience with this Firm:
21 years
Education: Degree(s)/Year/Specialization:
Michael graduated from the University of Central Arkansas with a Bachelors in Business Administration and a Masters in Business Administration.
Other experience and qualifications relevant to the proposed Project:
Michael has over 20 years of experience in municipal finance with expertise spanning across all municipal sectors. His knowledge of the industry and creativity has allowed him the opportunity to originate, structure, and execute bond transactions across the United States.

General Professional Services Questionnaire

PROFESSIONAL NO. 2
Name & Title:
Ken Antee, Business Development
Name of Firm with which associated:
Crews & Associates, Inc.
Description of job responsibilities:
Ken will serve as a support banker to Michael Lambert.
Years' experience with this Firm:
5 years
Education: Degree(s)/Year/Specialization:
Ken graduated with a Bachelor of Arts degree in Legal Studies from Northeast Louisiana University (now University of Louisiana Monroe) and earned his law degree from Mississippi College School of Law.
Other experience and qualifications relevant to the proposed Project:
Ken has been an attorney for thirty-three years, served eight years as the Chief Administrative Officer for the City of Shreveport, and as an investment banker has earned his Series 50, 52 and 63 licenses.

General Professional Services Questionnaire

PROFESSIONAL NO. 3
Name & Title:
Jeremy Couvillion, Business Development
Name of Firm with which associated:
Crews & Associates, Inc.
Description of job responsibilities:
Jeremy will serve as a support banker to Michael Lambert.
Years' experience with this Firm:
2 years
Education: Degree(s)/Year/Specialization:
Jeremy has a bachelor's degree in elementary education along with a master's degree in educational leadership and administration from Louisiana State University.
Other experience and qualifications relevant to the proposed Project:
Jeremy spent 17 years as a teacher, principal and superintendent in Louisiana, and was even named the 2017 East Baton Rouge Parish Principal of the Year. Jeremy has since transitioned into the business world where he helps school districts improve their business services and opportunities.

General Professional Services Questionnaire

PROFESSIONAL NO. 4
Name & Title:
Tyler Schaller, Analyst III
Name of Firm with which associated:
Crews & Associates, Inc.
Description of job responsibilities:
Tyler will provide analytical support.
Years' experience with this Firm:
7 years
Education: Degree(s)/Year/Specialization:
Tyler has an accounting degree from the University of Arkansas.
Other experience and qualifications relevant to the proposed Project:
Tyler assists Capital Markets bankers in a variety of aspects of a municipal bond transaction, including the pricing, structuring and reviewing of documents.

General Professional Services Questionnaire

PROFESSIONAL NO. 5
Name & Title:
Katie Eisenhart, Head of Municipal Underwriting
Name of Firm with which associated:
Crews & Associates, Inc.
Description of job responsibilities:
Katie handles the competitive bidding for our underwriting department and also works with the underwriting team to price the negotiated bond issues that come to market through Crews.
Years' experience with this Firm:
16 years
Education: Degree(s)/Year/Specialization:
Katie graduated from Arkansas Tech University with a Bachelor of Science in Marketing and Management.
Other experience and qualifications relevant to the proposed Project:
Katie's sales experience allows her to help salesmen with their customer inquiries to find new issues in the market as well as structure deals that are attractive to salesmen's customers.

General Professional Services Questionnaire

K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Since January 1, 2020, Crews has served as senior managing underwriter or co-senior managing underwriter on 180 transactions totaling over \$2.85 billion nationally and 38 transactions totaling over \$350 million in Louisiana. Since January 1, 2019, Crews has served as placement agent on over \$1.1 billion nationally and on 25 transactions in the State of Louisiana totaling over \$425 million. A list of transactions can be provided upon request.</p>	
Length of Services Provided:	Cost of Services Provided:

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

General Professional Services Questionnaire

PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

General Professional Services Questionnaire

PROJECT NO. 7	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

PROJECT NO. 8	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

General Professional Services Questionnaire

PROJECT NO. 9	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

PROJECT NO. 10	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1. N/A	N/A	N/A
2.		
3.		
4.		

M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.

Crews is a regional broker dealer. Our Public Finance footprint is focused on selective States, including Louisiana. We are typically a top three underwriter in these States each year based on the number of deals. As previously stated, since January 1, 2020, Crews has served as senior managing underwriter or co-senior managing underwriter on 180 transactions totaling over \$2.85 billion nationally and 38 transactions totaling over \$350 million in Louisiana. Our client list includes all issuers of municipal debt. In Louisiana, a few of our clients we served over the last couple of years include, but are not limited to, Louisiana Insurance Guaranty Association, Acadia Parish, Caddo Parish, Lafourche Parish, Livingston Parish, St. Bernard Parish, City of Slidell, City of Monroe, and the City of Shreveport. Our services to our Louisiana clients included public and private issuances including tax exempt bonds, taxable bonds, Cinderella Bonds, and direct placements.

N. To the best of my knowledge, the foregoing is an accurate statement of facts.

Signature: _____  _____ **Print Name:** Michael Lambert

Title: Senior Managing Director
Head of National Public Finance **Date:** 3/1/23