

EXHIBIT I

CITY OF SAN ANTONIO Department of Finance

Summary and Recommendations to Provide Broker/Dealer Services FY 2024

Firms With Capital Less Than \$20 Million

No.	Firm	Broker Name	Office Location
1	Bancroft Capital, LLC ¹	Steve Ivicic	Fort Washington, PA
2	Cabrera Capital Markets, LLC ³	Steven Goff	Chicago, IL
3	Castle Oak Securities, L.P.	Susan Schiefelbein	Portland, OR
4	Drexel Hamilton, LLC ¹	John Glynn	Memphis, TN
5	Great Pacific Securities ³	Christopher Vinck	Costa Mesa, CA
6	Mischler Financial Group, Inc. ²	Dennis Kite	Corona Del Mar, CA
7	SWBC Investment Services, LLC ⁶	Chris Elbrecht	San Antonio, TX

Firms With Capital Greater Than \$20 Million But Less Than \$500 Million

No.	Firm	Broker Name	Office Location
1	InspereX, LLC	Dan Larsen	Delray Beach, FL
2	Loop Capital Markets ⁴	Martin Trekas	Chicago, IL
3	Multi-Bank Securities, Inc. ⁵	Carol Mackoff	Chicago, IL
4	Piper Jaffray & Co.	Jason Jeansonne	Houston, TX
5	BOK Financial Securities	William Weller	Tulsa, OK

Firms With Capital Greater Than \$500 Million

No.	Firm	Broker Name	Office Location
1	Cantor Fitzgerald & Co. ⁷	John Nealon	Dallas, TX
2	Daiwa Capital Markets America ⁷	Andres Tamayo	New York, NY
3	Oppenheimer & Co. Inc.	Chris Sullivan	New York, NY
4	Raymond James & Associates, LLC	Joshua Spain	St. Petersburg, FL
5	RBC Capital Markets, LLC ⁷	Tom Kelly	New York, NY
6	Robert W. Baird & Co.	Ken Fenson	Houston, TX
7	Stifel, Nicolaus & Company, Inc.	Michael Bell	Dallas, TX

¹ Meets qualifications for Veteran Owned Business, but is not certified with the South Central Texas Regional Certification Agency; and does not meet the City's qualifications for SBEDA firms.

² Meets qualifications for Veteran Owned Business, as well as Veteran Business Enterprise, Hispanic American Business Enterprise, and Minority-Owned Business Enterprise firm based on the South Central Texas Regional Certification Agency, however, does not meet the City's qualifications for SBEDA firms.

³ Certified as a Small Business Enterprise, Hispanic American Business Enterprise, and Minority-Owned Business Enterprise firm based on the South Central Texas Regional Certification Agency, however, does not meet the City's qualifications for SBEDA firms.

⁴ Certified as an African American Business Enterprise and Minority Business Enterprise firm based on the South Central Texas Regional Certification Agency; however, does not meet the City's qualifications for SBEDA firms.

⁵ Certified as a Veteran Business Enterprise, and a Disabled Business Enterprise firm based on the South Central Texas Regional Certification Agency; however, does not meet the City's qualifications for SBEDA firms.

⁶ Meets qualifications for Local Preference Program, but is not certified with the South Central Texas Regional Certification Agency; and does not meet the City's qualifications for SBEDA firms.

⁷ Designated as a Primary Dealer by the New York Federal Reserve.