


# Pre-Proposal Meeting Checklist

County Banking Services  
Spec #18-05/22

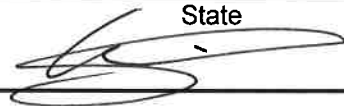
March 314, 2022 1:00 PM

**NOTICE:** Obtaining all bid documents including Addendums is the responsibility of the Bidder.


1. **YOU MUST PRINT CLEARLY!**

Company Name	<u>UNIVEST Bank</u>	Phone:	<u>410-389-2252</u>
Street Address	<u>14 MAIN STREET</u>	Email:	
City	<u>Souderton PA</u>	Unit /Suite #	<u>Hawthorne B E Univest. <del>CA</del> <sup>PA</sup></u>
State	<u>PA</u>	Zip	
Signature:		I have read and understand the the Notice above:	
Printed Name and Title			

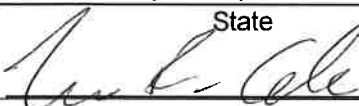
2. **YOU MUST PRINT CLEARLY!**

Company Name	<u>TD BANK</u>	Phone:	<u>215-791-3472</u>
Street Address	<u>3220 Tillman Dr.</u>	Email:	<u>kevin.wiley@td.com</u>
City	<u>Bensalem PA</u>	Unit /Suite #	<u>19020</u>
State	<u>PA</u>	Zip	
Signature:		I have read and understand the the Notice above:	
Printed Name and Title		<u>Kevin M. Wiley, VP</u>	

3. **YOU MUST PRINT CLEARLY!**

Company Name	<u>Univest Bank</u>	Phone:	<u>487-913-1581</u>
Street Address	<u>14 MAIN ST</u>	Email:	
City	<u>Souderton PA</u>	Unit /Suite #	
State	<u>PA</u>	Zip	
Signature:		I have read and understand the the Notice above:	
Printed Name and Title			

4. **YOU MUST PRINT CLEARLY!**

Company Name	<u>Santander Bank</u>	Phone:	<u>215-359-7803</u>
Street Address	<u>Ridge Pike</u>	Email:	<u>nma.colap@santander.us</u>
City	<u>Conshohocken PA</u>	Unit /Suite #	
State	<u>PA</u>	Zip	
Signature:		I have read and understand the the Notice above:	
Printed Name and Title		<u>Nma Cola - Cash Mgmt</u>	

# Pre-Proposal Meeting Checklist

County Banking Services  
Spec #18-05/22

March 314, 2022 1:00 PM

**NOTICE:** Obtaining all bid documents including Addendums is the responsibility of the Bidder.

5. **YOU MUST PRINT CLEARLY!**

<u>Penn Community Bank</u>			Phone: <u>215-788-6094 X6101</u>
Company Name			
<u>118 Mill St.</u>			Email: <u>xcarroll@penncommunitybank.com</u>
Street Address			
<u>Prisbuck</u>	<u>PA</u>	<u>19007</u>	
City	State	Zip	
Signature: <u>[Signature]</u>			I have read and understand the the Notice above:
Printed Name and Title			<u>Tracey Carroll, SVP Dir. Cash mgmt.</u>

6. **YOU MUST PRINT CLEARLY!**

<u>JPMORGAN CHASE BK</u>			Phone: <u>609 524-2160</u>
Company Name			
<u>300 CARNEGIE CENTER DR, SUITE 120</u>			Email: <u>VALERIA.CAPPUCCI@jpmorgan.com</u>
Street Address			
<u>PRINCETON</u>	<u>NJ</u>	<u>08540</u>	
City	State	Zip	
Signature: <u>[Signature]</u>			I have read and understand the the Notice above:
Printed Name and Title			<u>VALERIA D. CAPPUCCI, EXEC. DIR.</u>

7. **YOU MUST PRINT CLEARLY!**

<u>Wells Fargo</u>			Phone: <u>646-438-4840</u>
Company Name			
<u>302 Carnegie Ctr, 2nd Fl</u>			Email: <u>gloria.daudier@wellsfargo.com</u>
Street Address			
<u>Princeton, NJ</u>			
City	State	Zip	
Signature: <u>[Signature]</u>			I have read and understand the the Notice above:
Printed Name and Title			<u>Gloria Daudier, SVP RMPMG</u>

8. **YOU MUST PRINT CLEARLY!**

<u>Republic Bank</u>			Phone: <u>215-378-8964</u>
Company Name			
<u>599 S. Oxford Valley Rd</u>			Email: <u>amitchell@myrepublicbank.com</u>
Street Address			
<u>Fairless Hills PA</u>		<u>19030</u>	
City	State	Zip	
Signature: <u>[Signature]</u>			I have read and understand the the Notice above:
Printed Name and Title			<u>DREW MITCHELL, VP Stock Mg.</u>

Pre-Proposal Meeting Checklist

County Banking Services  
Spec #18-05/22

March 31, 2022 1:00 PM

NOTICE: Obtaining all bid documents including Addendums is the responsibility of the Bidder.

9. YOU MUST PRINT CLEARLY!

Fulton Bank  
Company Name Phone: 267-893-6709

379 N. Main Street  
Street Address Email: wmaeglin@fultonbank.com

Doylestown PA 18901  
City State Zip

I have read and understand the the Notice above:

Signature: [Signature] Printed Name and Title William D. Maeglin, VP

10. YOU MUST PRINT CLEARLY!

Meridian Bank  
Company Name Phone: 215-740-5782

1719 S. Easton Rd  
Street Address Email: arosado@meridianbank.com

Doylestown 18901  
City State Zip

I have read and understand the the Notice above:

Signature: [Signature] Printed Name and Title Aliese Rosado, AWP

11. YOU MUST PRINT CLEARLY!

PNC Bank  
Company Name Phone: 570-840-4239

1600 Market St.  
Street Address Email: sara.golosky@pnc.com

Phila PA 19103  
City State Zip

I have read and understand the the Notice above:

Signature: [Signature] Printed Name and Title SARA GOLOSKY, ATM O

12. YOU MUST PRINT CLEARLY!

PNC Bank  
Company Name Phone: 610-725-5713

1000 West Lakes Drive 1-4-5074  
Street Address Email: tricia.lefkof@pnc.com

Berwyn PA 19312  
City State Zip

I have read and understand the the Notice above:

Signature: \_\_\_\_\_ Printed Name and Title Tricia Lefkof, TMO

# Pre-Proposal Meeting Checklist

County Banking Services  
Spec #18-05/22

March 31~~st~~, 2022 1:00 PM

**NOTICE:** Obtaining all bid documents including Addendums is the responsibility of the Bidder.

County of Bucks and Engineer Representatives in Attendance:

Name:

From:

Kristian Pellerice

Treasurer

DAVID BRIA

DEPUTY TREASURER

MARIE MC

Purchasing

1:38