

Request for Proposals

Financial Advisor for Rental Assistance Demonstration Program (RAD)

Proposals due by 11:00 AM on Thursday, July 29, 2026

REQUEST FOR PROPOSALS

The Newton Housing Authority (Authority) is seeking the services of a Financial Advisor (FA) to provide customized advisory services in relation to financing its public housing portfolio through the US Department of Housing and Urban Development Rental Assistance Demonstration Program (RAD).

The Authority is converting its public housing units to Project Based Vouchers (PBV) under the RAD Program. Financial Services are being sought for the preparation of the application(s) to the New Jersey Local Finance Board for the subject RAD financing.

The Financial Advisor must be able to review the financing documents and advise accordingly and prepare the Local Finance Board (LFB) application(s) as well as represent the Authority at the LFB meetings.

Qualifications:

- 1) Must possess all applicable licenses and certifications necessary to undertake this work.
- 2) Must be approved by the United States Department of Housing and Urban Development to provide these services.

3) Should have previous experience providing these services on a similar scale.

Proposal Submission:

The following items should be included in the proposal:

- 1) Proposal Submission Sheet (attached herein);
- 2) Listing of similar projects that the firm has previously completed;
- 3) Listing of references;
- 4) Copies of applicable licenses and certifications;
- 5) Valid New Jersey Business Registration Form;
- 6) Certification that neither the firm nor any of the principals have been suspended or debarred from participation in HUD Programs (attached herein);
- 7) Non-Collusive Affidavit (attached herein)
- 8) Stockholder disclosure form (attached herein)
- 9) Affirmative Action Compliance Notice (attached herein)

Proposals shall be delivered to the Newton Housing Authority, 32 Liberty Street, New Jersey 07860 by 11:00 A.M, on or before July 30, 2026. The Authority will evaluate all proposals according to its "Competitive Proposal Evaluation System." All quotes for Financial Advisor shall be submitted on the required proposal submission sheet. This sheet should be the first page of your proposal.

This solicitation for proposals is being made in accordance with the New Jersey Local Unit Pay to Play law (NJSA 19:44A 20.4 et seq.) as a "fair and open" process.

PROPOSAL SUBMISSION SHEET

- 1) Name/Address of Firm:
- 2) Telephone / Fax / Email Address:
- 3) Contact Person:
- 4) Amount of Maximum Fee (attach separate sheet, if necessary):
- 5) Amount of any expected reimbursables:
- 6) Other:

COMPETITIVE PROPOSAL EVALUATION SYSTEM

Professional Services

Type of Services: Financial Advisor

Name/Address of Respondent:

- 1) Demonstrated experience and competence in this type of work (20 Points).
- 2) Familiarity with HUD rules and regulations in general (25 Points).
- 3) Capability and capacity to accomplish work within the required time period (15 Points).
- 4) Geographic location of the firm relative to the proximity to the Authority (10 Points).
- 5) Specialized experience of key personnel in Authority Programs (15 Points).
- 6) Firm's Equal Opportunity Policy. Each bidder must ensure that all employees and applicants for employment are not discriminated against because of race, color, religion, sex or national origin (5 Points).
- 7) Price (10 Points).

Total Point Score (100 Max):

Narrative Review of Proposal:

CERTIFICATION
Suspension & Debarment Form

Date: _____

Name of Firm: _____

Address: _____

Telephone #: _____

I, _____ (name), duly appointed _____ (position) of
the _____ (name of firm) do hereby certify

that I, nor any of principals of our firm, are suspended or debarred from doing business with the
U.S. Department of Housing & Urban Development.

(Signature)

(Print name)

Date: _____

Legal Advertisement

REQUEST FOR PROPOSALS

The Newton Housing Authority, New Jersey (Authority) will accept proposals from professional Financial Advisors to provide customized advisory services in relation to financing its public housing portfolio through the US Department of Housing and Urban Development Rental Assistance Demonstration Program (RAD). All services must be in accordance with the existing laws, rules, orders, directives and regulations governing these services.

All firms interested in submitting a proposal may download the formal Request for Proposals (RFP) from the Authority's website (newtonhousingauthority.com). The RFP specifies the scope of services and the requirements for submitting proposals. All questions must be submitted in writing to the Authority.

All proposals must be submitted to the office of the Newton Housing Authority at 32 Liberty Street, Newton, NJ 07860 on or before 11:00 AM on July 29, 2026.

The Authority reserves the right to reject any and all proposals received for these services. It also reserves the right to terminate the architect/engineer, for convenience, at any time during the term of the contract.

WILLIAM F. SNYDER
Executive Director

Non-Collusive Affidavit

AFFIDAVIT

State of _____

County of _____

_____ being first duly sworn deposes and says:
(Individual's Name)

THAT he is _____ of
(Owner, Officer or Partner)

(Firm Name)

the party making the foregoing proposal or bid dated September 19, 2017 for Financial Advisor; that such proposal or bid is genuine and not collusive or sham; that the bidder has not colluded, conspired, connived or agreed, directly or indirectly, with any bidder or person, to put in a sham bid or to refrain from bidding, and has not in any manner, directly or indirectly, sought by agreement or collusion, or communication or conference with any person, to fix the bid price of affiant or of any bidder, or to fix any overhead, profit or cost element of said bid price, or of that of any other bidder, or to secure any advantage against the Newton Housing Authority or any person interested in the proposed contract; and that all statements in the said proposal or bid are true.

(Signature of Bidder)

Subscribed and sworn to before me, this ____ day of _____, in the year _____

Notary Public

My Commission expires _____

STOCKHOLDER DISCLOSURE

Chapter 33 of the Public Laws of 1977 (N.J.S.A. 52:25-24-2) provides that no corporation or partnership shall be awarded any state, county, municipal or school district contract for the performance of any work or the furnishing of any materials or supplies, unless, prior to the receipt of the bid or accompanying the bid of said corporation or partnership, there is a submitted statement setting forth the names and addresses of all stockholders in the corporation or partnership who own ten percent (10%) or more of its stock of any class, or of all individual partners in the partnership who own a ten percent (10%) or greater interest therein. Form of Statement shall be completed and attached to the proposal.

NAME OF BUSINESS: _____

I certify that the list below contains the names and home addresses of all stockholders holding 10% or more of the issued and outstanding stock of the undersigned OR I certify that no one stockholder owns 10% or more of the issued and outstanding stock of the undersigned.

If a corporation owns all or part of the stock of the corporation or partnership submitting the bid, then the statement shall include a list of the stockholders who own 10% or more of the stock of any class of that owning corporation. If no one owns 10% or more stock, attest to that.

Circle the type of business that represents your organization:

Partnership / Corporation / Sole Proprietorship / Limited Partnership / Limited Liability Corporation / Limited Liability Partnership / Subchapter S Corporation

The above firm states that the following is a complete listing of stockholders/individual partners who will own ten percent (10%) or more interest in the above-named firm. Please sign and notarize the form below.

Name: _____

Name: _____

Home Address: _____

Home Address: _____

Name: _____

Name: _____

Home Address: _____

Home Address: _____

Subscribed and sworn before me
this ____ day of _____, 2026.

(Signature of Affiant)

(Notary Public)

My Commission expires: _____

(Print Name and Title of Affiant)

(Corporate Seal)

AFFIRMATIVE ACTION COMPLIANCE NOTICE

N.J.S.A. 10:5-31 and N.J.A.C. 17:27

GOODS AND SERVICES CONTRACTS

(INCLUDING PROFESSIONAL SERVICES)

This form is a summary of the successful bidder's requirement to comply with the requirements of N.J.S.A. 10:5-31 and N.J.A.C. 17:27-1 et seq.

The successful bidder shall submit to the public agency, after notification of award but prior to execution of this contract, one of the following three documents as forms of evidence:

(a) A photocopy of a valid letter that the contractor is operating under an existing Federally approved or sanctioned affirmative action program (good for one year from the date of the letter);

OR

(b) A photocopy of a Certificate of Employee Information Report approval, issued in accordance with N.J.A.C. 17:27-4;

OR

(c) A photocopy of an Employee Information Report (Form AA302) provided by the Division and distributed to the public agency to be completed by the contractor in accordance with N.J.A.C. 17:27-4.

The successful vendor may obtain the Affirmative Action Employee Information Report (AA302) from the contracting unit during normal business hours.

The successful vendor(s) must submit the copies of the AA302 Report to the Division of Contract Compliance and Equal Employment Opportunity in Public Contracts (Division). The Public Agency copy is submitted to the public agency, and the vendor copy is retained by the vendor.

The undersigned vendor certifies that he/she is aware of the commitment to comply with the requirements of N.J.S.A. 10:5-31 and N.J.A.C. 17:27.1 et seq. and agrees to furnish the required forms of evidence.

The undersigned vendor further understands that his/her bid shall be rejected as non-responsive if said contractor fails to comply with the requirements of N.J.S.A. 10:5-31 and N.J.A.C. 17:27-1 et seq.

COMPANY: _____

SIGNATURE: _____

PRINT NAME: _____

TITLE: _____

DATE: _____