



**REQUEST FOR QUALIFICATIONS
FINANCIAL ADVISOR
RFQ NO. 18-0927-01**

TO ALL PROSPECTIVE RFQDERS:

You are hereby invited to submit your RFQ for the item(s) to be furnished and delivered, shipped F.O.B. delivered, to the address specified herein.

The original RFQ and the required number of copies must be received in a sealed envelope that has respondent's name and address in the upper left corner and the attached label affixed in the lower right corner.

All RFQ's are subject to staff analysis. LVWD reserves the right to accept or reject any and all RFQ's received and waive any and all technicalities.

**1557 FM ROAD 1110
CLINT, TEXAS 79836**

**RFQ OPENS:
SEPTEMBER 27, 2018 @ 1:00 pm**

LOWER VALLEY WATER DISTRICT

NOTICE TO RFQDERS
FINANCIAL ADVISOR
LVWD RFQ NO. 18-0927-01

September 11, 2018

Re: FINANCIAL ADVISOR: RFQ NO. 18-0927-01

Important Notice

It is the Respondent's responsibility to ensure that they have all pertinent information regarding solicitations, including all amendments prior to submitting their offer. Please check the website, even after submitting a RFQ, to ensure that you have all amendments as they may be posted at any time, up to and including the day of RFQ opening.

The LOWER VALLEY WATER DISTRICT (LVWD), is soliciting RFQ's for FINANCIAL ADVISOR. RFQ's will be received by LVWD until 1:00 P.M., Local Time, Thursday, September 27, 2018, at which time only the name of the submittals will be opened and read aloud.

Contract for services may be contingent upon the release of funds from federal, state or local funding and/or funded by Lower Valley Water District. Any contract or contracts awarded under this RFQ, where applicable, are expected to be funded in part or completely by a loan or grants from federal, state, or local funding agencies. Neither the State of Texas nor any of its department, agencies, or employees are or will be a party to this RFQ, or any resulting contract.

Some contracts will be subject to the Environmental Protection Agency's (EPA) "fair share policy" which includes EPA approved "fair share goals" for Minority Business Enterprise (MBE) & Women Business Enterprise (WBE) firms in the Services procurement category. EPA's policy requires that applicants and prime contractors make a good faith effort to award a fair share of contracts, subcontracts, and procurements to SMWBE's. Although EPA's Policy does not mandate that the fair share goals be achieved, it does require the District and prime contractors to demonstrate a good faith effort in accomplishing these goals. The current fair share goals for the State of Texas are as follows:

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Procurement Category	MBE Goal Percentage (%)	WBE Goal Percentage (%)
Construction	19.44%	12.13%
Equipment	16.28%	15.29%
Services	20.41%	18.32%
Supplies	25.34%	12.14%

Any questions and/or comments about this RFQ should be submitted through E-Mail with Subject: "Questions on FINANCIAL ADVISOR RFQ NO. 18-0927-01" email to Gabrelle Diaz, RFQ Specialist, at gdiaz@lvwd.org, no later than Wednesday September 19 2018.

RFQ REQUIREMENTS:

All RFQs must be **sealed** and received in the Purchasing office, LVWD, 1557 FM Road 1110, Clint, Texas 79836 prior to RFQ opening. All RFQ's must be submitted on the attached RFQ form and shall conform to terms and conditions set forth in this Request for Qualifications (RFQ). Please make and retain a copy of your Response (RFQ) for your records. Do not bend, fold, or staple RFQ form. The envelope containing your Qualifications must be plainly marked on the lower left corner with label LVWD has provided, respondent's information should be included-upper right-hand corner. **Respondents must be sign, in ink, the RFQ form where indicated. Unsigned RFQ's will not be read. RFQ's will be opened at 1:00 P.M., Local Time, Thursday, September 27, 2018.**

The LVWD reserves the right to accept or reject any or all RFQ(s), to waiver technicalities and to award the RFQ(s) deemed most advantageous and in the best interest of the District. No RFQs may be withdrawn after the RFQ opening.

Please direct all questions pertaining to this RFQ by email with subject line as indicated above-gdiaz@lvwd.org, Gabrelle Diaz, RFQ Specialist.

Gabrelle Diaz
RFQ Specialist

LOWER VALLEY WATER DISTRICT

FINANACIAL ADVISOR RFQ NO. 18-0927-01 PURPOSE AND BACKGROUND

1. Purpose. The purpose of this Request for Qualifications (RFQ) is to solicit Qualifications from qualified vendors (“Vendor”, “Vendors”, “Offeror”, or “Offerors”) to establish a contract through competitive sealed Qualifications for the provision of services as Financial Advisor (the “Financial Advisor”, or “FA”) for Lower Valley Water District (“LVWD”).

Offerors interested in responding to this request for Qualifications should have experience as a financial consultant and have demonstrated experience in designing financing for water districts in an average amount of **10 years**.

2. Background. LVWD was created as a municipal utility district in 1986, and it is located in the southeastern portion of El Paso County, Texas. LVWD currently offers water, wastewater, and solid waste services to the residents of its service area. LVWD constantly applies to local, state, and federal agencies for funds to construct adequate water and wastewater systems for the residents of its service area. The LVWD Board of Directors consists of five members who are elected by the District’s taxpaying residents every four years with staggered terms. The Board along with the management and staff work diligently to achieve the goal of providing water, wastewater, and solid waste services to the residents.

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FINANCIAL ADVISOR RFQ NO. 18-0927-01 RFQ SPECIFICATIONS

LVWD is seeking services of a qualified Financial Advisor to provide financial advisory services including but not limited to evaluating bond markets, debt management, maintaining credit ratings. The successful firm will be an impartial third party experienced in working with local government municipalities in providing Financial Advisory Services.

LVWD reserves the right to select more than one Financial Advisor or to form Financial Advisory Teams.

Due to inherent conflicts of interest, the successful firm will not be allowed to serve as an underwriter for any proposed transactions on which the firm provides Financial Advisory Services. If your firm or a subsidiary of your parent firm has an underwriting division or a commercial securities operation, either wholesale or retail, it is expected that this relationship will be disclosed, and your firm will be allowed to submit a Qualification.

I. SCOPE OF SERVICES/SPECIFICATIONS:

Responsibilities for Coordinating and Implementing Bond Issuance:

- A. Work with bond counsel and Financial Advisory Team in recommending the size, structure, timing, specific terms and conditions of debt issue.
- B. Provide advice and assistance on the requirements of various financing structures, the principal amount of bonds to be sold and maturity schedules.
- C. Assist in the preparation and development of bond documents. The advisor shall be responsible for reviewing resolutions, documents, and attending sessions and presentations, as well as reviewing and providing financial comments upon documents as to form and content to protect the District interest.
- D. Provide financial advice regarding market conditions and trends, financial products, credit rating enhancement, and credit analysis, bond covenants and coverage requirements.
- E. Preparation and distribution of preliminary and final official statements.
- F. Provide general assistance and advice to LVWD on plans and methods of financing its capital improvement plans.

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- G. Present alternative strategies for managing the LVWD's current or future debt to achieve the best value for LVWD.
- H. Assist LVWD in all aspects of a negotiated bond issuance including, but not limited to, the preparation and mailing of the request for qualifications to provide financial underwriting services, in-depth evaluation of qualifications submitted, selection of an underwriting team and other matters related to the successful consummation of negotiated transaction(s).

Responsibilities for General Financial Planning Support Include:

- A. Provide analytical support and guidance as needed to support LVWD's financial planning and budgeting process.
- B. Provide advice and counsel regarding developments in the financial markets and assist the District with decisions that result in top-tier financial position with a corresponding credit rating.
- C. Work with management to develop options, plans and strategies for future financing needs.
- D. Provide a debt affordability analysis to permit matching of existing and proposed debt service requirements with available resources.
- E. Assist with preparation of presentations to LVWD Board Members; attend Board meetings as needed.
- F. Advising LVWD of market developments and conditions, including the impact of pending legislation at the state and federal levels and financing techniques that may be applicable to LVWD's bond financing program.
- G. Working with LVWD staff, bond counsel, independent auditors, and special consultants in developing financing programs and marketing of bonds.
- H. Preparing the market for the LVWD's bond offerings, including systematic contacts with bond rating agencies and prospective respondents, explaining LVWD's offerings to firms and individuals in the bond markets, and all necessary communications and contact with journals, periodicals, and dealers.
- I. Arranging and coordinating meetings between LVWD officials and rating agencies.
- J. Continual monitoring of the feasibility of refunding opportunities to determine and recommend the desirability of refinancing existing debt including the provision of assistance in all aspects and phases of the refunding transaction.
- K. Evaluating and providing recommendations on unsolicited Qualifications from investment banking firms and financial consultants.

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- L. Prepare information for and present to LVWD Board of Director's when required and/or requested.
- M. Provide other financial services as required.

The overall period of performance shall be effective from **DATE OF CONTRACT AWARD** through **A PERIOD TO BE DETERMINED THROUGH CONTRACT NEGOTIATIONS**.

Special Services Include:

- A. Coordinating and preparing the submission any document required by federal and state laws and regulations.
- B. Providing technical financial analysis related to financing options for various economic development projects as they pertain to the LVWD's credit ratings. This should include, but not be limited to annual disclosure requirements and material events notices.
- C. Coordinating and preparing the annual continuing disclosure compliances.
- D. Any other non-traditional activities the Financial Advisor(s) may deem appropriate. LVWD encourages innovation.

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FINANCIAL ADVISOR

RFQ NO. 18-0927-01

II. QUALIFICATIONS/COMPANY OVERVIEW/OPERATIONAL INFORMATION

Firm Background/Respondent's Qualification/Personnel

Each respondent to this Qualifications must be able to meet the following minimum requirements:

- Describe the organization, date founded, and size of firm, location of home office and location of the site from which your staff will be working with LVWD.
- Provide details on the qualifications of the firm, including documentation of the firm's experience with similar work, experience with major rating agencies, financial institutions, and investors during the past five (5) years.
- Provide a description of the firm's access to sources of current market information to assist in pricing of negotiated sales and information to assist LVWD in planning and executing competitive sales.
- Describe the firm's financial advisory experience necessary to assist LVWD with either competitive or negotiated sales, include knowledge in understanding LVWD's financial situation, including ideas on how LVWD should approach financing issues such as bond structures, credit rating strategies and investor marketing strategies.
- List the most significant agreements (maximum of five) performed in the last three (3) years that are like the services described in this request for Qualifications.
- Provide audited financial statements for the past three (3) years.
- Describe and submit samples of the reports that would be provided and their frequency. Include the methods and formulas used to calculate yield and performance.
- Provide disclosure of any finder's fees, fee splitting, payments to consultants, or other contractual arrangements of the firm that could present a real or perceived conflict of interest.
- Provide disclosure of any pending investigation of the firm or enforcement or disciplinary actions taken within the past five years by the SEC or other regulatory bodies.
- Explain changes that have occurred within your firm over the last twelve (12) months regarding staffing, capital, and organizational structure, as well as future changes you expect may occur.
- Identify the professionals who would be directly involved in providing services to LVWD. Describe their relationship to your firm, their responsibilities, their experience with municipal financial advisory services, their location and the number of years they have been associated with your firm. Include resumes of key personnel who will be assigned to handle this contract. Primary and alternate personnel shall be clearly identified.
- Describe efforts your firm makes to keep its professionals informed of developments relevant to government investments.

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- Define how your staff will be available to LVWD staff; include any relevant information on communicating with your company.
- Provide a complete and current listing of all industry certifications, accreditations, and affiliations your firm holds.
- Describe your firm's business continuity plan.

COMPANY OPERATIONAL INFORMATION

Client History-Describe whether your firm (or any firm previously affiliated with your firm), has ever undergone an investigation by an outside agency pursuant to the filing of claims and describe the outcome of the investigation including ramifications to your firm or your firm's client cities.

Describe whether your firm has ever lost an account due to concerns of improper billing practices, accusations or clients concerns of fraud as defined by applicable Federal or State Authorities.

Describe in detail-whether your firm has ever lost an account due to breach of contract or incurred any unfavorable contractual outcomes (to include any terminations, etc.).

REFERENCES

Provide five (5) recent or current references for which you have provided the type of services described herein. For each reference, include dates the services were performed, name, address, phone, contact person and email.

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RFQ NO. 18-0927-01

III. QUALIFICATIONS CONTENT & EVALUATION CRITERIA

Qualifications Response Documents/Qualifications Format and Content

LVWD discourages lengthy and costly Qualifications, however, for LVWD to evaluate Qualifications fairly and completely, proposers should follow the format set out herein and provide the information required.

To be considered as responsive, the Proposer shall submit with their Qualifications, such documentation as is necessary or required to attest to the company’s capabilities and qualifications to perform the work as specified and all aspects of this contract in a competent manner. RFQ responses shall be submitted professionally (and not bound with plastic sleeves or spiral binders) to include clearly identifiable labels, in the same order for each section provided below.

Evaluation Process and Selection Criteria

The objective of this evaluation process is to identify and select the proposer that best satisfies the requirements for LVWD. LVWD’s staff will be responsible for these services will evaluate all Qualifications received by the submission deadline. The evaluation committee will review, rate, and rank each proposer’s Qualifications in accordance with the weighted ranking criteria contained in this document. RFQ responses shall remain confidential until the contract has successfully been awarded.

If deemed necessary to the evaluation process, LVWD reserves the right to conduct presentation/interviews with the proposers at no cost to LVWD.

There are 100 possible points for this Qualifications evaluation, breakdown is as follows:

Experience and capability of the firm and it’s assigned consultants in performing financial advisory services for municipalities.	25 points
Understanding LVWD’s financial condition and needs.	20 points
Demonstrated competence and provided references on similar or related services.	25 points
Experience in providing innovative financing strategies and non-traditional services.	15 points
Completeness and responsiveness of Qualifications	15 points

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FINANCIAL ADVISOR RFQ NO. 18-0927-01 IV.RFQ FORM/PRICING

Compensation

Provide the firm's Financial Advisory fee schedule for services related to each specific debt issuance (contingent on bond sale) and for general services provided on an ongoing basis (not contingent on bond sale) and describe the basis on which the fees are calculated. Include details of any alternate method of compensation such as hourly fees, per bond basis, or annual retainers your firm would consider.

List all expenses pertaining to an issue that will be reimbursable by LVWD. Example: bond printing, bond counsel, official statement printing, bond election expenses, bond ratings and related expenses, and so forth.

Identify and list all special services and identify charges, particularly disclosure requirements.

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GENERAL INFORMATION
FINANCIAL ADVISOR
RFQ NO. 18-0927-01

Questionnaire to Determine Principal Place of Business Under Article LGC2252.002 Texas revised Civil Statutes.

GENERAL INFORMATION:

1. Legal Name of Business: _____
2. Street Address: _____
3. Post Office Box (if any) or Mailing Address if different from question #2:

4. City: _____ State: _____ Zip: _____
5. Telephone Number: _____
6. Nature of Business (i.e., automobile dealer, electrical contractor, etc.):
7. _____
8. Type of Business Organization (check one):
_____ Sole Proprietorship _____ Other Legal Entity
_____ Partnership (General or Limited) _____ Corporation

QUESTIONS RELATED TO PRINCIPAL PLACE OF BUSINESS:

1. In what State is your principal place of business? _____
2. In what State, if any, is your business incorporated? _____
3. If business is a corporation, furnish the name and address of the agent for services:

4. Is your business authorized to do business under the laws of the State of Texas?

5. Do you transact business in more than one State? _____
If so, list all States in which you transact business: _____

6. In what State, is most of your activities conducted? _____
7. List the total gross sales of your business within the last two calendar years?

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8. In what State does your business earn the largest percentage of its revenues?

What percentage is earned in Texas? _____
9. In what State is largest percentage of the capital? _____
Assets of your business located? _____
What percentage is in Texas? _____
10. Give the address of your general office where centralized control of your business is conducted? _____
11. In what State does the largest percentage of full-time equivalent employees of your business reside permanently? _____
How many full-time equivalent employees reside permanently in Texas?

12. Give the name and residential address(es) of the officer(s), sole proprietor or partners of the business: _____

Owner or Officer

Print Name

Print Title

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STANDARD TERMS AND CONDITIONS FINANCIAL ADVISOR RFQ NO. 18-0927-01

1. RFQ Responses:

a. Respondents are encouraged to submit RFQs on any or all items or services their firms can provide. All prices are to be your lowest and best net price, F.O.B. Destination, on each item. Unit price for each item offered need to include all applicable discounts. In case of error in extension, unit price will govern.

b. RFQs will not be accepted and tabulated unless the Qualifications Acknowledgement Form of the RFQ is filled out completely and contains an original signature, in ink, by an authorized representative of the company. Each RFQ form response shall be typewritten or handwritten in ink. Unsigned RFQs will be considered a NO RFQ.

2. **Estimated Quantities:** The quantities shown on the RFQ form are estimated, based on projected use. It is specifically understood and agreed that these quantities are approximate. Any increase in quantities will be paid for at the quoted RFQ price, unless required by law to be re-RFQ. It is further understood that the supplier will not have any claim against the District for the purchase of quantities less than the estimated amount.

3. **Product Standards:** When a brand name and identification number are shown on the RFQ form, they indicate an acceptable standard, the features of which must be considered when providing equals. This brand name is used only to establish a quality level, and basic features required. RFQs on equivalent or better are encouraged but must be accompanied with appropriate information for evaluation purposes. Failure to include such information will disqualify the RFQ on that item. If responding on other than referenced specifications, RFQ must identify manufacturer, brand, model, etc., of the article being offered. If other than brand(s) specified is offered, complete descriptive information in literature form of each article being RFQ must be included with RFQ. Even if Respondent takes no exception to specifications of reference data, he will be required to furnish brand names, models, etc., as specified.

4. **Awarding RFQs:** The recommendation for awarding RFQs or Qualifications shall include an assessment of at least the following:

- a) Individual item price
- b) Total price of all items
- c) Delivery dates
- d) Terms and conditions
- e) Location of vendor
- f) Quality of material

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- g) Safety features
- h) Past performance of products and vendor
- i) Transportation charges
- j) Good business practices
- k) Conformance to appropriate local, state, and federal ordinances, statues and regulations

5. **Right to Rebid:** The District reserves the right to re-bid any item contained in this RFQ invitation, when fair market value of the item(s) is reduced by a factor of ten (10) percent.

6. **Price Per Unit:** Unit prices are to be based on the unit of measure requested on the RFQ form provided such as each, pound, serving, pair, gross, foot, pint, gallon or ounce. Failure to do so will disqualify the RFQ on that item. **All charges, including delivery charges must be included in the RFQ price.**

7. **Prices Submitted:** The District reserves the right to award on a basis of a low total, a low RFQ by item, or in any combination that will best serve the interest of the District. Pricing must include all shipping, handling and related transportation costs.

8. **Deviation:** List any deviations from the specifications on the accompanying deviation form. Respondent's must list all deviation for products offered as equals to specific products.

9. **Term of Contract:** RFQ prices must prevail for a period of one year from the date of award unless stated otherwise in the Special Term and Conditions and/or RFQ Specifications of the attached RFQ Invitation.

10. **Extensions:** The District reserves the option to renew this contract for an additional period(s) if service is satisfactory, escalation does not exceed five (5) percent per year, and the renewal is agreed to by both parties. In no event shall the length of the agreement exceed three (3) years.

11. **Purchase Order:** Vendor agrees that no deliveries will be made unless they are in receipt of properly executed Purchase Order issued by Lower Valley Water District for items to be delivered. The District is under no obligation to pay any vendor for delivery of goods or services without receipt of Purchase Order. Request for supplies, material, and/or services will be made through an official Purchase Order as needed by District.

12. **Invoices:** The vendor/contractor should e-mail invoices to PAYABLES@LVWD.ORG. Invoices will be paid net 30 from receipt of invoice by Lower Valley Water District. Vendors are required to submit invoice by e-mail. Invoices should be itemized and reflect Purchase Order Number and RFQ Number. Do not include Federal Tax, State Tax, or City Tax. The District will furnish a tax exemption certificate.

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13. **Failure to Honor RFQ Prices:** Any vendor failing to honor a RFQ submitted or delivers items not meeting specifications may be removed from the RFQ list for a period of two (2) years. Items delivered not as specified on the award will be the responsibility of the vendor to recover and credit to the District at no expense to the District.

14. **Failure to Respond to RFQ Invitation:** Failure to participate in two (2) successive RFQ invitations will constitute grounds to remove a vendor from the RFQ list.

15. **RFQ Withdrawal:** A vendor may withdraw its RFQ at any time prior to the scheduled time of opening. Any request by a Respondent to withdraw a RFQ must be in person or in writing and submitted to the Purchasing Office prior to scheduled opening time. Subsequent of the RFQ opening, a RFQ cannot be withdrawn for a period of sixty (60) days.

16. **Request for Interpretation and Clarification:** If any Respondent is in doubt as to the meaning of any part of this RFQ document he or she may submit a written request for an interpretation at least seven (7) days prior to opening of RFQs. The person submitting the request will be responsible for its prompt delivery. An interpretation of the proposed documents will be made by addendum when needed to uniformly communicate with all vendors. An addendum will be e-mailed to each company receiving a set of RFQ documents. The District will not be responsible for any other explanation or interpretation of the proposed documents.

17. **Contesting RFQ Award Recommendations:** Vendors wishing to contest a recommendation for award of RFQs and/or present additional information relevant to the RFQ will be required to submit a letter stating the reason(s) for contesting the recommended award of RFQs and any information relevant to the RFQ award. The letter is to be submitted to the General Manager no less than forty-eight (48) hours prior to the meeting of the Board of Directors where this RFQ is on the agenda for action.

18. **Penalties for Non-Performance:** If at any time, the contractor/vendor fails to fulfill or abide by the terms, conditions, or specifications of the contract, the District reserves the right to:

- a) Purchase on the open market and charge the contractor the difference between contract and actual purchase price, or
- b) Deduct such charges from existing invoice totals due at the time, or
- c) Cancel the contract within thirty (30) days written notifications of intent.

19. **Conflict of Interest:** No employee of the District shall have a direct financial interest in any contract with the district, nor shall an employee have a direct financial interest in the sale to the District of any land, equipment, supplies and materials, or service. Any violation of this policy will render the contract involved void unless such contract or sale is approved by the Board after all full disclosure.

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20. **Certification Regarding Debarment:** The Contractor certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction (contract) by any governmental department or agency. If the Contractor cannot certify this statement, attach a written explanation for review by LVWD.

21. **Indemnification:** The Respondent shall comply with the requirements of all applicable laws, rules, and regulations and shall exonerate, indemnify and hold harmless the Lower Valley Water District ("District") from any and all Liability or Damages resulting from failure to do so.

In addition, the Respondent agrees to keep, save and hold the District harmless from any and all actions, liabilities, damages, judgments, costs and expenses including reasonable attorney's fees, in case an action is filed or does in any way accrue against the District, its officials, officers, and employees in consequence of the contract for any negligent act or omission of the vendor in the provision of merchandise under the contract, or that may result from the carelessness or lack of skill of the Respondent or the Respondent's agent, contractors, assigns, or employees. In the event a judgment is recovered against the District for any such liability, costs or expense, such judgment shall be conclusive against the vendor.

It is specifically understood and agreed by the Respondent that such indemnity is indemnity by the Respondent to indemnify and protect the District from Liability, Claims, Suits, Losses, Damages or Cause of action to the Respondent's Negligence, Error or Omission.

22. **Delivery of Items:** All items are to be delivered to the **Lower Valley Water District's, 1557 FM 1110 Road, Clint, Texas 79836, attention: Purchasing Department**, unless otherwise specified in the purchase order sent to the Seller by the Buyer pursuant to which the goods are delivered.

23. **Warranty:** All equipment items awarded because of this RFQ will be covered by an all parts and labor warranty, including any and all transportation charges, for a period of at least one year.

24. **Statement of Delivery:** A specific statement of delivery after receipt of order (ARO), for each item must be made a part of this RFQ and will be a significant determiner in the award for an item where price differences exist.

25. **Tax Exemption:** The Lower Valley Water District is exempt from all local, state and federal taxes. Tax exemption certificates will be provided upon request.

26. **Failure to Meet all Terms and Conditions:** Failure to meet all Standard Terms and Conditions may constitute grounds for invalidating the RFQ(s).

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27. **RFQ Document:** This agreement is composed of the following; Instruction to Respondent, General Conditions, Special Conditions, Standard Terms and Conditions, RFQ Form, Reference, Specifications, Deviations and all Addendums and Forms.

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RFQ ACKNOWLEDGEMENT FORM
FINANCIAL ADVISOR
RFQ NO. 18-0927-01

(PLEASE TYPE OR PRINT THE FOLLOWING INFORMATION)

“The undersigned affirms that he/she is duly authorized to execute this contract, that this company, corporation, firm, partnership or individual has not prepared this RFQ in collusion with any other Respondent, and that the contents of this RFQ as to prices, terms, or conditions of said RFQ have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this RFQ.”

COMPANY’S NAME: _____

ADDRESS: _____

PHONE: _____

FAX NUMBER: _____

RFQDER (Signature): _____

RFQDER (Print Name): _____

POSITION with Company: _____

SIGNATURE of Company
Official Authorizing This RFQ: _____

Company Office
(Print Name): _____

Official Position: _____

.....
The Respondent hereby acknowledges receipt of the following listed addenda and agrees that all addenda issued are made part of the contract documents, and the Respondent further agrees that his/her abides/includes all changes resulting from said addenda.

ADDENDUM NO. _____ DATE _____

ADDENDUM NO. _____ DATE _____

ADDENDUM NO. _____ DATE _____

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REFERENCES

The Respondent must list five (5) references, listing firm name, dates of service, address, contact person, email address and telephone number to whom they have provided similar equipment, material or services.

COMPANY NAME:	
DATES OF SERVICE:	
ADDRESS:	
CONTACT PERSON:	
EMAIL ADDRESS:	
TELEPHONE NUMBER	

COMPANY NAME:	
DATES OF SERVICE:	
ADDRESS:	
CONTACT PERSON:	
EMAIL ADDRESS:	
TELEPHONE NUMBER	

COMPANY NAME:	
DATES OF SERVICE	
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EMAIL ADDRESS:	
TELEPHONE NUMBER	

COMPANY NAME:	
DATES OF SERVICE:	
ADDRESS:	
CONTACT PERSON:	
EMAIL ADDRESS:	
TELEPHONE NUMBER	

LATE RFQS CANNOT BE ACCEPTED!

<p>SEALED REQUEST FOR QUALIFICATIONS RFQ NO. 18-0927-01 OPENING DATE: 09-27-2018 OPENING TIME: 1:00 PM DESCRIPTION: FINANCIAL ADVISOR</p>
<p>DATED MATERIAL-DELIVER IMMEDIATELY</p>

Please cut out and affix this RFQ label (above), include your name/address on upper left-hand corner to the outermost envelope of your RFQ to help ensure proper delivery!

LATE RFQS CANNOT BE ACCEPTED!