

REQUEST FOR QUALIFIED ATTORNEYS TO PARTICIPATE IN THE ATLANTA HEIRS PROPERTY PREVENTION & RESOLUTION INITIATIVE

PREPARED BY:

**THE ATLANTA DEVELOPMENT AUTHORITY
D/B/A INVEST ATLANTA**

AND

**URBAN RESIDENTIAL FINANCE AUTHORITY
OF THE CITY OF ATLANTA, GEORGIA**

Release Date: November 14th, 2025

RESPONSES DUE: December 31st, 2025



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Atlanta, GA 30303

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

SECTION I

INTRODUCTION

Invest Atlanta (“IA”) and the Urban Residential Finance Authority (URFA) of the City of Atlanta is soliciting competitive, sealed responses (“Responses”) from interested and qualified Attorneys or law firms (“Respondents”) to provide heirs property prevention and resolution services (further described in the Section III Scope of Services). The intent and purpose of this request for qualifications is to identify a pool of Attorneys or law firms that specialize in estate planning and title resolution. The selected attorneys will provide estate planning and title resolution services to qualified residents, aiming to stabilize communities, preserve intergenerational wealth, and prevent the loss of property due to complex ownership issues

Respondents shall be selected and determined through IA’s review of each response, considering the factors identified in this Request for Qualifications (“RFQC”) and any other factors that it considers relevant to serving the best interest of IA and its mission. Nothing in this RFQC shall be construed to create any legal obligation on the part of Invest Atlanta or any respondents. Invest Atlanta reserves the right, in its sole discretion, to amend, suspend, terminate, or reissue this RFQC in whole or in part, at any stage. In no event shall Invest Atlanta be liable to respondents for any cost or damages incurred in connection with the RFQC process, including but not limited to, any and all costs of preparing a response to this RFQC or any other costs incurred in reliance on this RFQC. No respondent shall be entitled to repayment from Invest Atlanta for any costs, expenses or fees related to this RFQC. All supporting documentation submitted in response to this RFQC will become the property of Invest Atlanta. Respondents may also withdraw their interest in the RFQC, in writing, at any point in time as more information becomes known.

BACKGROUND

Invest Atlanta has been duly created and is existing under and by virtue of the Constitution and the laws of the State of Georgia (the “State”), in particular, the Development Authorities Law of the State (O.C.G.A. §36-62-1 et seq., as amended) and an activating resolution of the City, duly adopted on February 17, 1997, and approved by the Mayor of the City on February 20, 1997, and is now existing and operating as a public body corporate and politic of the State. Invest Atlanta was created to promote the revitalization and growth of the City and serve as the City’s Economic Development Agency. Invest Atlanta represents a consolidation of the City’s economic and community development efforts in real estate, finance, marketing and employment, for the purpose of providing a focal point for improving the City’s neighborhoods and the quality of life for all of its citizens. Invest Atlanta is the cornerstone of an overall effort to provide economic and development services in a more effective and efficient manner.

The Urban Residential Finance Authority (URFA) is a public body in Atlanta, Georgia, created to make housing more affordable for low and moderate-income working families. It achieves this by issuing revenue bonds to finance multi-family housing projects, providing mortgage loans and down payment assistance, and managing various real estate and housing development programs. Its goal is to provide decent, safe, and sanitary housing options at prices and rentals that people can afford.

The Invest Atlanta Homeownership Team is a 4-person team responsible for the administration of all single-family program initiatives. The Atlanta Heirs Property Prevention and Resolution Initiative will be launched first as a pilot to assist the current pipeline Owner-Occupied Rehab and Anti-Displacement Tax Relief Fund recipients with estate planning and title issues. Program participants will be low-income seniors in great need of these services. The program will pay for these services on behalf of the participants.

SECTION II

TIMELINE OF EVENTS AND SUBMISSION INSTRUCTIONS

INQUIRIES AND PROCESS TIMELINE

Only inquiries received electronically will receive a response. Do not contact any Invest Atlanta staff with any questions or comments pertaining to this RFQC. All such inquiries must be delivered by **5:00 p.m., November 25th, 2025 to the issuing officer at heirsproperty@investatlanta.com**. Inquiries received after such date and time will not receive a response. Invest Atlanta will publish all timely received written inquiries and Invest Atlanta’s responses to those inquiries as an Addendum to this RFQC on Invest Atlanta’s website (www.investatlanta.com) on or before the close of business on **December 5th, 2025**.

Due Date	Action Required
November 14th, 2025	Release of RFQC
November 20th, 2025 @ 11:30am-12:30pm EST	Microsoft Teams Join the meeting Meeting ID: 255 912 260 026 11 Passcode: ma2ua6wG

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

	Dial in by phone +1 470-571-3959,,122569789# conference ID: 122 569 789#
November 25th , 2025	Written questions due to Invest Atlanta
December 5th, 2025	Responses to written questions posted
December 31st, 2025	Responses due to Invest Atlanta

SUBMISSION INSTRUCTIONS

A. Responses to this Request for Qualifications must be submitted in electronic Portable Document Format (PDF) no later than **5:00 p.m., December 31st, 2025, to the issuing officer at heirsproperty@investatlanta.com**. Proposals should include all identified components (Responses to Mandatory Requirements, Exhibit A Offer to Participate, Exhibit B the Attorney Questionnaire, and Additional Requirements and Forms). Qualifications received after the deadline, time and date will not be considered.

By submitting a response to the RFQC, the Respondent is acknowledging that the Respondent:

1. Has read the information and instructions,
2. Agrees to comply with the information and instructions contained herein.

From the time of release of this RFQC through the conclusion of the selection process, there shall be no communication between any Respondents and/or their lobbyist or authorized/unauthorized agent(s) with any staff of the City, IA or the Atlanta Development Authority ("ADA"), any elected or appointed official of the City, IA, ADA and/or their staff or financial advisor, except as provided for in the RFQC, unless such communication is initiated by IA and is unrelated to this RFQC process. Any violation of this provision by any Respondent and/or its lobbyist or authorized/unauthorized agent(s) shall be immediate grounds for disqualification for award of a contract in connection with this RFQC.

The laws of the State of Georgia, including the **Georgia Open Records Act**, as provided in O.C.G.A §50- 18-70, et seq., require certain public records be made available for public inspection. Even though information (financial or other information) submitted by a Respondent may be marked as “confidential”, “proprietary”, etc., Invest Atlanta will make its own determination regarding what information may or may not be withheld from disclosure.

**SECTION III
SCOPE OF SERVICES**

The Invest Atlanta Heirs Property Prevention & Resolution Initiative, (the “Program”) which will provide estate planning and title resolution services to Senior residents within the city of Atlanta. Qualified Participating Attorneys (the “Attorneys”) will be selected to conduct estate planning and title resolution for a term not to exceed one year (Attorney Acceptance Period), unless engagement(s) are sooner terminated by URFA or until all funds are depleted: Cases will be provided to selected attorneys in a round-robin fashion based on the particular expertise of the firm.

General Overview

This scope outlines the legal services provided by the Attorney to clients seeking assistance with estate planning and/or tangled title resolution. Services are tailored to meet individual client needs and may vary based on case complexity, jurisdictional requirements, and family or property circumstances.

- I. Heirs Property Resolution Services
Attorneys will provide the following heirs property resolution services:
 - A. Title Review and Assessment
 - Review property records and chain of titles.
 - Identify all heirs, potential claimants, and ownership interests.
 - B. Heirship and Probate Proceedings
 - File and manage estate administration or probate petitions (testate or intestate).
 - Represent clients in Probate Court as needed to establish legal heirs or obtain Letters of Administration.
 - C. Title Correction and Deed Transfer
 - Draft and file corrective or confirmatory deeds.
 - Facilitate transfer of title to rightful heirs or beneficiaries.
 - Coordinate with title insurance companies and recorders of deeds offices.

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

- D. Mediation and Dispute Resolution
 - Represent clients in negotiations or mediations with co-heirs or disputing parties.
 - Provide litigation services if disputes cannot be resolved informally.
 - E. Client Education
 - Educate clients on best practices for maintaining clear title after resolution.
 - F. Compliance
 - Maintaining case records and providing periodic reports.
 - Work with program administrators to ensure timely legal intervention for applicants.
- II. Estate Planning Services**
Attorneys will provide the following estate planning services:
- A. Consultation and Needs Assessment
 - Conduct intake interviews to understand client goals, assets, family dynamics, and potential legal risks.
 - Educate clients on estate planning tools and state-specific probate laws.
 - B. Document Drafting and Execution
 - Prepare and finalize estate planning documents, which may include:
 - Last Will and Testament
 - Powers of Attorney (Financial and Medical)
 - Advance Healthcare Directives / Living Wills
 - HIPAA Authorizations
 - Ensure proper execution of documents according to state law.
 - C. Asset Protection and Distribution Planning
 - Advise on beneficiary designations, property titling, and asset protection strategies.
 - Develop plans to minimize estate taxes and avoid the creation of heirs property and probate where possible.
 - D. Guardianship and Special Needs Planning
 - Assist with designation of guardians for minor children or incapacitated adults.
 - E. Periodic Review and Updates
 - Offer periodic document reviews and updates due to life changes, new legislation, or client requests.

Participating Attorney's Responsibilities

- **Client Communication:** Maintain regular and transparent communication with clients, providing updates on case progress and explaining complex legal concepts in a clear, understandable manner.
- **Document Management:** Maintain organized and confidential files for each client, including all legal documents, correspondence, and case notes.
- **Reporting:** Provide regular progress reports to Invest Atlanta's Homeownership Teams as required, detailing case status, services rendered, and outcomes.
- **Program Adherence:** Adhere to all program rules, regulations, and reporting requirements established by URFA and /or Invest Atlanta.
 - Attorneys must use the forms and training materials provided by URFA.
 - Attorneys and their staff must attend the mandatory training, which will introduce required program documents and case management steps.

This RFQC serves as a preliminary screening process to establish a pool of qualified vendors to participate in the program. Specifically, URFA will select one or more firms (not to exceed 7 - 10 firms) to participate in the program. These qualifications will serve as the source for future Invitations to bid (ITB), Requests for Quotes and/or Requests for Proposals (RFPs) related to heirs property and estate planning legal services from January 30, 2026 through December 31, 2030;

GENERAL BUSINESS REQUIREMENTS

1. All Attorneys or firms shall have an active business license or if a joint venture, each entity must be registered to do business in the State of Georgia.
2. Each firm must possess a valid Federal Taxpayer ID (TIN) or Employee Identification number (EIN). Respondents will be required to provide a W9 prior to contract execution.
3. Firm(s) must be in good standing with the Secretary of State and have no recent bankruptcies, legal action, or judgements against them that would hinder their ability to fulfil the contract.
4. Firm(s) must have a written non-discrimination policy that complies with all federal, state, and

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

local laws.

5. Firm must adhere to the Georgia Rules of Professional Conduct and all applicable laws and regulations.

**SECTION IV
TECHNICAL REQUIREMENTS**

The technical requirements below provide a framework of the minimum standards that must be upheld for firms providing Property maintenance-related services. Firms are encouraged to carefully review all requirements and tailor their proposals accordingly while ensuring compliance with applicable laws and regulations.

MANDATORY REQUIREMENTS

To be considered responsive, responsible, and eligible for award or for selection as a qualified contractor, **Respondents must answer all questions in this section in the affirmative (with a “Yes”) to pass and must be submitted as a part of your response.**

1. Attorneys/Firm(s) must have a minimum of 5 years' experience with providing estate planning or probate related legal services. **Does the Respondent have a minimum of 5 years of estate planning or probate experience?**
2. Attorneys/Firm(s) must be in good standing with the City of Atlanta and Invest Atlanta in order to do business under this contract. **Does the Respondent, in whole or in part, agree that it does not have any delinquent loan payments with the City of Atlanta or Invest Atlanta?**
3. All Attorneys/Firm(s) that will perform work within the Heirs Property Prevention and Reslution Program must have a current license to practice law and are in good standing with the State Bar of Georgia. **Does the Respondent, comply with this requirement?**
4. Attorneys/Firm(s) shall disclose any past or pending litigation in which the firm has been a defendant for professional negligence or malpractice. **Does the Respondent agree to disclose this information, if any?**
5. Attorneys/Firm(s) shall confirm there are no conflicts of interest that would prevent it from performing the services described in the Section III Scope of Services. **Does the Respondent confirm that no conflicts of interest exist?**
6. Vendors shall have a written policy confirming that all employees who will be on-site have passed or will pass a criminal background check. **Does the Respondent agree to comply with this requirement?**

MANDATORY SCORED REQUIREMENTS

The Respondent's technical proposal shall be structured in alignment with the framework provided below. To be considered responsive, responsible, and eligible for an award or for selection as a qualified contractor, you must answer all questions in this section. **Respondents shall provide responses on Exhibit B the Attorney Questionnaire, in addition to the Cover letter and Additional Requirements and Forms.**

A. PROPOSAL OVERVIEW AND COVER LETTER

1. Respondents shall provide a cover letter summarizing the key points of their response. The cover letter shall be executed by an officer or employee of the firm who is authorized to commit the Respondent's resources to IA's proposed transaction. Please limit your transmittal letter to two (2) pages.
 - a. **Include** name of business (include any dba names); headquarters and parent company locations; mailing address, contact person, telephone number for primary contact person, email address; and a principal or officer of the business authorized to execute contracts or other similar documents on the business' behalf.

B. FIRM OVERVIEW & TEAM QUALIFICATIONS (35 PTS)

1. **Describe** your firm's organizational structure and capacity to handle a high volume of heirs property and estate planning cases. Please include the number of attorneys and paralegals dedicated to this practice area.
2. **Provide** the names and qualifications of the specific attorneys and staff who will be assigned to this project. Include their resumes, highlighting their experience in real estate law, probate, and estate planning.
3. **Explain** your firm's approach to staff training and professional development to ensure a high level of expertise in Georgia's heirs property laws and legal trends.

C. RELEVANT EXPERIENCE WITH PROJECTS SIMILAR IN SCOPE (25 PTS)

1. **Describe** your firm's specific experience in handling heirs property cases, including quiet title actions and affidavits of heirship. Include how many heirs property resolution cases AND estate plans that have been completed in the past 5 years, respectively. Provide at least three case studies or examples of successful outcomes.

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

2. **Detail** your firm's experience with estate planning services for low-to-moderate-income clients, including drafting wills, trusts, and powers of attorney.
3. **Provide** three (3) references from clients or organizations for whom your firm has provided similar services within the past three years. Include the client's name, contact information, and a brief description of the services provided.
4. **Describe** how your firm will ensure a culturally competent and empathetic approach when working with residents from diverse backgrounds who may be dealing with sensitive family and financial issues.
5. **Explain** your firm's proposed quality control and reporting process to ensure accuracy and compliance with the program's requirements.

D. LAW FIRM FINANCIAL STRENGTH (20 PTS)

1. **Provide** your firm's proposed fee structure for the services outlined in the Section III Scope of Services. This should include hourly rates for all personnel who will be working on the project, as well as any flat-rate options for specific services (e.g., quiet title action, will preparation).
2. **Describe** your firm's financial capacity to support the project. Provide a recent financial statement or other evidence to demonstrate your firm's ability to absorb potential initial costs and maintain operations throughout the contract period.
3. **Detail** any other costs that may be associated with the services, such as filing fees, and how those will be managed and billed.

E. ACCESSIBILITY TO CLIENTS (20 PTS)

1. **List** of closing office addresses. Please describe in detail your accessibility to buyers. (Are your offices located on a rail or bus line? Are your attorneys mobile? etc.)

ADDITIONAL REQUIREMENTS & FORMS

F. OPERATING DOCUMENTATION

1. **Wiring Instructions** for each participating office
2. A copy of the Attorney's or Law Firm's **audited financial statements for the last two fiscal years** and the most recent interim financial statement or a copy of unaudited financial and filed tax returns for the last two fiscal years
3. A copy of a valid **Professional Liability Errors and Omissions Policy** covering the limits specified in Exhibit D. If it expires in the next 60 days, please provide documentation to show continued coverage
4. A copy of the **Attorney's or Firm's Quality Control Procedures**

G. CERTIFICATION STATEMENT

The following shall be repeated in the Respondent's Response and signed by an individual authorized to bind the Respondent. Failure to include and provide an original signature of the certification statement may result in rejection of Response.

"I agree to abide by the conditions of this RFQC and certify that all the information provided in this Response is true and correct, that I am authorized to sign this Response for the Respondent, and that the Respondent is in compliance with all requirements of the RFQC."

Authorized Signature: _____

Name:

Title:

H. E-VERIFY AFFIDAVIT & SAVE AFFIDAVIT

Provide notarized proof of compliance with Illegal Immigration Reform and Enforcement Act, O.C.G.A. §13-10-90, et seq. (Appendix A) E-Verify. Respondents must comply with the Illegal Immigration Reform and Enforcement Act, O.C.G.A. §13-10-90, et seq. All services physically performed within the State of Georgia must be accompanied by proof of your registration with the E-Verify Program, as well as verification of your continuing and future participation in the E-Verify program established by the United States Department of Homeland Security. A completed E-Verify Contractor Affidavit must be submitted to Invest Atlanta (Appendix A-1). To the extent there are subcontractors working on this contract, you are responsible for obtaining a fully signed and notarized subcontractor affidavit from those firms with whom you have entered into sub-contracts (Appendix A-2). In turn, should there be second-tier subcontractors on this project, you must require the subcontractors to obtain E-Verify Affidavits from those second-tier.

I. DIVERSITY, EQUITY INCLUSION POLICY

At Invest Atlanta, economic prosperity and competitiveness in Atlanta start with equity—equitable access to opportunity and pathways to wealth creation. It is more than a goal; it is a guiding principle that drives us. We advance our work through this lens to ensure that all Atlantans are positioned to benefit from

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

economic investments in our city, regardless of their zip code.

Invest Atlanta encourages all Respondents to promote opportunities for diverse businesses, including Minority Business Enterprises (“MBE”), Female Business Enterprises (“FBE”), and Small Business Enterprises (“SBE”) to compete for business as subcontractors and/or suppliers.

However, nothing herein should indicate that an MBE, FBE, or SBE may not apply and be selected independently, as MBEs, FBEs, and SBEs that meet the qualifications of this ITB are encouraged to submit their qualifications for consideration. For an MBE, FBE, or SBE to participate on the contract, said MBE, FBE, or SBE must be certified as an MBE or FBE and be registered with the City’s Office of Contract Compliance M/FBE Register. SBEs must be registered with the City and are defined as businesses not 2.5 million in gross sales during the recent calendar or fiscal year.

- **City of Atlanta – Office of Contract Compliance (MBE/FBE):**
 Jason Ingram
 68 Mitchell St. SW, Suite 5100, Atlanta, Georgia
 30303 Tel: 404.330.6010
 Fax: 404.658.7359
 email: jingram@AtlantaGa.Gov
- **Small Disadvantaged Business (SDB)** certification by the U.S. Small Business Administration provided they reflect certification because of minority or women-owned status.

If joint responses are permitted within this RFQC, a firm selected by the Respondent to jointly respond to this RFQC can only satisfy one of three categories. The same firm may not, for example, be listed for participation as an MBE organization and a SBE organization even if the level of participation exceeds each category’s goal. All firms must be registered or certified prior to the submittal of the Response. A Respondent is at risk in that there may be an issue of time to certify or register if it intends to use a firm that is not certified or registered at the time the Response is submitted. Invest Atlanta is an Equal-Opportunity Employer.

**SECTION IV
COST REQUIREMENTS**

REMOVED

**SECTION V
EVALUATION CRITERIA AND SELECTION PROCESS**

SELECTION CRITERIA

The Selection Committee comprised of Invest Atlanta staff will review qualifications in accordance with the evaluation criteria set forth herein and IA overall objectives and policies. Quotes that are submitted in a timely manner and comply with the mandatory requirements of the RFQC will be evaluated in accordance with the terms of the RFQC. Any contract/purchase order resulting from this RFQC will not necessarily be awarded to the vendor with the lowest price. Instead, a contract/purchase order shall be awarded/issued to the vendor whose proposal best fits the needs and objectives of Invest Atlanta.

Evaluation Process	Weight of Eval. Process	Evaluation Criteria	Weights of Eval. Criteria
Technical	100 pts	<i>Company and Team Qualifications</i>	35 pts
		<i>Relevant Experience</i>	25 pts
		<i>Law Firm Financial Strength</i>	20 pts
		<i>Accessibility to clients</i>	20 pts

When evaluating proposals, IA reserves the right to:

- (1) Waive technicalities or irregularities in Responses at its discretion;
- (2) Accept or reject any or all Responses received as a result of this RFQC;
- (3) Obtain information concerning any and all Respondents from any source;
- (4) Schedule an oral interview before the Review Committee from any or all Respondents or Respondents identified within a Competitive Range;
- (5) Select for contract negotiation or award, a Response other than that with the highest score if, in the judgment of IA, it shall serve the public’s best interests; and
- (6) Negotiate with the successful Respondent with respect to any additional terms and conditions of the contract.

IA may rely on all representations therein for 120 days from the date established for receipt of proposals.

TECHNICAL EVALUATION

As specified with each requirement listed in Section 4: Technical Requirements- Mandatory Requirements, the Respondent must answer all questions in this section in the affirmative (with a “Yes”) to pass and must be submitted as a part of your response. To be considered responsive and eligible for

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

an award, all mandatory requirements identified must be met.

Additionally, all requirements described within Mandatory Scored Requirements must be met and completed. The responses to the Mandatory Scored Requirements require a narrative description to be completed. The responses will be evaluated by a team, designated by Invest Atlanta, in accordance with the scoring rubric above. Specifically, the responses provided to the Mandatory Scored Requirements serve as the basis for the technical evaluation and score.

COST EVALUATION AND SCORE

REMOVED

OVERALL COMBINED SCORE

The Respondent's Overall Combined Score consists of the summation of the average technical scores per technical criteria by the selection/evaluation committee. Respondents will be ranked based on their Overall Combined Score. A Competitive Range may be determined by identifying any natural groupings or breaks within the pool of Respondents.

After evaluating all proposals in accordance with this section, IA may determine that the number of most highly rated proposals that might otherwise be included in the competitive range exceeds the number at which an efficient competition can be conducted. Therefore, IA may limit the number of proposals in the competitive range to the greatest number that will permit efficient competition among the most highly rated proposals.

SELECTION

On or about January 30, 2026, URFA will send a notice of acceptance (the "Notice of Acceptance") to each Attorney selected to participate in the Program. The Notice of Acceptance shall specify, among other things:

1. The date on which the Program will begin.
2. Date of mandatory training.
3. Attorney Acceptance Period; and
4. The date upon which the Attorney will begin servicing Invest Atlanta referred clients (the "Application Start Date").

No later than 5:00 p.m. on February 6, 2026, selected attorneys shall deliver to URFA:

1. One executed signature page of the Notice of Acceptance; and
2. A final list of all attorneys that will participate in the Program along with their contact information to include, but not limited to, email address, and phone number.

**SECTION VI
GENERAL TERMS AND CONDITIONS**

All qualifications and supporting materials as well as correspondence relating to this RFQC become property of Invest Atlanta when received. Any proprietary information contained in the Response should be so indicated. However, a general indication that the entire contents, or a major portion, of the proposal is proprietary will not be honored.

- A. All applicable State of Georgia and Federal laws, City and County ordinances, licenses and regulations of all agencies having jurisdiction shall apply to the Respondent(s) and the scope of services. The engagement letter with the Respondent(s), and all questions concerning the execution, validity or invalidity, capability of the parties, and the performance of the services, shall be interpreted in all respects in accordance with the laws of the State of Georgia.
- B. Professionals requiring special licenses must be licensed in the State of Georgia and shall be responsible for those portions of the work as may be required by law.
- C. No Response shall be accepted from, and no contract will be awarded to, any person, firm, or corporation that (i) is in arrears to Invest Atlanta or the City with respect to any debt, (ii) is in default with respect to any obligation to Invest Atlanta or the City, or (iii) is deemed irresponsible or unreliable by Invest Atlanta. If requested, the Respondent shall be required to submit satisfactory evidence that they have the necessary financial resources to provide the proposed services.
- D. From the date Invest Atlanta receives a Respondent's proposal through the date a contract is awarded to a Respondent, no Respondent may make substitutions, deletions, additions, or other changes in the configuration of Respondent's proposal or members of Respondent's team.

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

Attachments

- a) Request for Qualified Contractors Solicitation (this document)
- b) Exhibit A Offer to Participate
- c) Exhibit B Attorney Questionnaire
- d) Exhibit C SAVE Affidavit & E-Verify
- e) Exhibit D Insurance Requirements
- f) Exhibit E Diversity & Equity Certification Form
- g) Exhibit F Contract Disclosure & Declaration Form

EXHIBIT A

URBAN RESIDENTIAL FINANCE AUTHORITY OF THE CITY OF ATLANTA, GEORGIA

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

Accompanying this RFP Response is

- An original of the Attorney Questionnaire, attached hereto as **(Exhibit B)**, which Questionnaire has been duly authorized, executed and delivered by the Attorney. The Attorney hereby agrees to hold URFA, its employees and its agents harmless, and agrees to indemnify them from any cost they incur as a result of any material misstatement in or omission from, such Questionnaire.
- Attached S.A.V.E. Affidavit **(Exhibit C)**
- Certification Statement **(Section G. pg A-6)**

The Attorney hereby certifies that in connection with the transaction contemplated hereby, it has not directly or indirectly contracted or entered into any agreement with any other Attorney or any other person or institution (except URFA or its agents) with respect to any aspect of the Attorney's participation in this process, other than an agreement expressly authorized by the Offer. In particular, the Attorney warrants that he or she has not communicated or agreed with any other Attorney or other institution as to the amount of Mortgage Loans he or she has hereby offered to close.

This Offer is a unilateral offer and shall form a binding contract if accepted by URFA. This Offer shall be deemed a contract between the Attorney and URFA upon the URFA's acceptance hereof, whether or not notice of such acceptance is communicated in writing to the Attorney, it being understood that URFA intends to notify the Attorney within a reasonable time after URFA's acceptance.

The name and address to which notices regarding this offer and related matters should be forwarded is:

Name of Attorney: (Please Type) _____

Street Address: _____

City _____ State _____ Zip Code _____

Phone Number: _____ Fax Number: _____

Email: _____

(SEAL)

ATTESTED:

By: _____

By: _____

Name: _____

Title: _____

Firm: _____

Address: _____

Date: _____

NOTE: ALL COMMUNICATIONS CONCERNING THIS OFFER WILL BE SENT TO THE ADDRESS ABOVE. IF APPROVALS OR RESPONSES ARE REQUIRED FROM OFFICES OTHER THAN THE ABOVE, PLEASE INDICATE SUCH BELOW.

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

EXHIBIT B

URBAN RESIDENTIAL FINANCE AUTHORITY OF THE CITY OF ATLANTA, GEORGIA

ATTORNEY QUESTIONNAIRE

ATLANTA HEIRS PROPERTY PREVENTION & RESOLUTION INITIATIVE

This form is to be used by all attorneys and law firms requesting approval as a Real Estate Closing Attorney eligible to close loans for the Invest Atlanta/URFA mortgage assistance programs. Send the application with signature and all supporting documentation and narrative statements, as requested. PLEASE PROVIDE AN ORIGINAL OF THIS QUESTIONNAIRE, IN ADDITION TO THE FOLLOWING INFORMATION:

Name of the Firm:	Address of the Primary Office (list branch offices on a separate sheet of paper):
Acronym; aka, or dba, if applicable	Name, Title, Date & Signature of Authorized Person:

- I. **Firm Overview & Team Qualifications** *(Please include the Firm's Corporate Resume, as well as individual professional vitae highlighting specific experience of the partners, associates, of counsel, or senior counsel)*
 - a. Describe your firm's organizational structure and capacity to handle a high volume of heirs property and estate planning cases. Please include the number of attorneys and paralegals dedicated to this practice area.
 - b. Provide the names and qualifications of the specific attorneys and staff who will be assigned to this project. Include their resumes, highlighting their experience in real estate law, probate, and estate planning.
 - c. Explain your firm's approach to staff training and professional development to ensure a high level of expertise in Georgia's heirs property laws and legal trends.

- II. **Relevant Experience with projects similar in Scope:**
 - a. Describe your firm's specific experience in handling heirs property cases, including quiet title actions and affidavits of heirship. Include how many heirs property resolution cases AND estate plans that have been completed in the past 5 years, respectively. Provide at least three case studies or examples of successful outcomes.
 - b. Detail your firm's experience with estate planning services for low-to-moderate-income clients, including drafting wills, trusts, and powers of attorney.
 - c. Provide three (3) references from clients or organizations for whom your firm has provided similar services within the past three years. Include the client's name, contact information, and a brief description of the services provided.

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

- d. Describe how your firm will ensure a culturally competent and empathetic approach when working with residents from diverse backgrounds who may be dealing with sensitive family and financial issues.
- e. Explain your firm's proposed quality control and reporting process to ensure accuracy and compliance with the program's requirements.

III. **Law Firm Financial Qualifications and Capacity**

- a. Provide your firm's proposed fee structure for the services outlined in the Section III Scope of Services. This should include hourly rates for all personnel who will be working on the project, as well as any flat-rate options for specific services (e.g., quiet title action, will preparation).
- b. Describe your firm's financial capacity to support the project. Provide a recent financial statement or other evidence to demonstrate your firm's ability to absorb potential initial costs and maintain operations throughout the contract period.
- c. Detail any other costs that may be associated with the services, such as filing fees, and how those will be managed and billed.

IV. **Accessibility to Clients**

- a. List of closing office addresses. Please describe in detail your accessibility to buyers. (Are your offices located on a rail or bus line? Are your attorneys mobile? etc.):

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

EXHIBIT C-2

CONTRACTOR AFFIDAVIT UNDER O.C.G.A §13-10-91(b)(1)

By executing this affidavit, the undersigned Contractor verifies its compliance with O.C.G.A. §13-10-91, et seq. (the "Act") and Chapter 300-10-1 of the Rules of Georgia Department of Labor (the "Rules"), stating affirmatively that the individual, firm, or corporation which is engaged in the physical performance of services on behalf of Invest Atlanta: (1) has registered with; (2) is authorized to use; (3) is using; and (4) will continue to use throughout the contract period a federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicability provisions and deadlines established in the Act and the Rules.

The undersigned contractor further agrees that, should it employ or contract with any subcontractor(s) in connection with the physical performance of services pursuant to the contract with Invest Atlanta of which this affidavit is a part, the undersigned contractor will secure from such subcontractor(s) similar verification of compliance with the Act and the Rules through the subcontractor's execution of the subcontractor affidavit provided below.

The undersigned contractor further agrees to provide a copy of each such affidavit to Invest Atlanta at the time the subcontractor(s) is retained to perform such services and to maintain copies of all such affidavits for no less than five (5) years from the date provided to Invest Atlanta and otherwise maintain records of compliance with the Act and the Rules as required.

Contractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

Employment Eligibility Verification (E-Verify)
User Identification Number

Date of Authorization

I hereby declare under penalty of perjury that the foregoing is true and correct.

BY: Authorized Officer or Agent

Date

Subcontractor Name

Title of Authorized Officer or Agent of Subcontractor

Printed Name of Authorized Officer or Agent

Sworn to and subscribed before me
This ____ day of _____, 202__

Notary Public My commission expires: _____

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

Exhibit D Professional Services Insurance Requirements

Statutory Worker's Compensation Insurance

- Employer's Liability insurance with limits of \$1,000,000 per occurrence for each bodily injury claim, \$1,000,000 per occurrence for each bodily injury caused by disease claim, and \$1,000,000 aggregate for all bodily injuries caused by disease claims.

Waiver of subrogation in favor of IA and URFA. Commercial General Liability Insurance

- Insurance limits in an amount not less than \$1,000,000 per occurrence subject to a \$2,000,000 aggregate.
- Additional Insured status on a primary and noncontributory basis in favor of IA and URFA.
- Waiver of subrogation in favor of IA and URFA.

Professional Liability Insurance

- Insurance limits in an amount not less than \$1,000,000 per occurrence subject to a \$2,000,000 aggregate.
- Waiver of subrogation in favor of IA and URFA, if available.

All coverages

- 30-day notice of cancellation provided to IA and URFA.

Attorneys to Participate the Atlanta Heirs Property Resolution & Prevention Initiative

EXHIBIT E



Diversity and Equity Certification Form

The Atlanta Development Authority d/b/a Invest Atlanta (“Invest Atlanta”) is committed to monitoring the participation of businesses owned and operated by diverse persons in its procurement of services and goods. It is imperative that potential vendors and consultants provide the requested information and return this form to Invest Atlanta’s Director of Compliance as part of any purchasing process.

Vendor/Consultant Name: _____

Business Address: _____

Address _____ City _____ State _____ Zip Code _____

A **Minority Business Enterprise** is defined as being **at least 51% owned and controlled** by one or more of the following categories: African American, Asian American, Hispanic American, or Native American. A **Female Business Enterprise** is defined as being **at least 51% owned and controlled** by one or more women. A **Disabled Veterans’ Business** is defined as being **at least 51% owned and controlled** by one or more service-disabled veterans

1. Check ALL categories that apply to your business entity. Indicate N/A if no categories are applicable.

- African American Business Enterprise
- Asian American Business Enterprise
- Hispanic American Business Enterprise
- Native American Business Enterprise
- Non-minority Female Business Enterprise
- Not Applicable

2. Check ALL categories that apply to any subcontractors to be used for the current procurement. Indicate N/A if no categories are applicable or if all work will be self-performed.

- African American Business Enterprise
- Asian American Business Enterprise
- Hispanic American Business Enterprise
- Native American Business Enterprise
- Non-minority Female Business Enterprise
- Not Applicable

3. Check ALL categories that apply to your business entity. If “Yes”, please provide a copy of the verification letter from the U.S. Department of Veteran Affairs, Center for Veterans Enterprise.

Veteran Owned Business Service Disabled Veteran Owned Business Not Applicable

4. Has your business been awarded certification as an M/FBE, or a DBE (whether SBA 8(a), DOT, or other) with another governmental agency, department, or authority? Yes No If yes, then please provide a copy of your certification letter or certificate.

5. Is your principal place of business located in the 20 County metro Atlanta area? Yes No
(Barrow, Bartow, Carroll, Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Hall, Henry, Newton, Paulding, Rockdale, Spalding, Walton)

Signature: _____

Title: _____
(Must be senior management level)

Printed Name: _____

Date: _____

EXHIBIT F
INVEST ATLANTA CONTRACTOR DISCLOSURE AND DECLARATION
FORM

DEFINITIONS FOR THE PURPOSE OF THIS DISCLOSURE AND DECLARATION FORM

“Affiliate”	Any legal entity that, directly or indirectly through one of more intermediate legal entities, controls, is controlled by or is under common control with the RFP Respondent or a member of Respondent.
“Contractor or Vendor”	Any person or entity having a contract with Invest Atlanta
“Control”	The controlling entity: (i) possesses, directly or indirectly, the power to direct or cause the direction of the management and policies of the controlled entity, whether through the ownership of voting securities or by contract or otherwise; or (ii) has direct or indirect ownership in the aggregate of fifty-one (51%) or more of any class of voting or equity interests in the controlled entity.
“Respondent or Offeror” (the terms are interchangeably used on this Form)	Any individual or entity that submits a Proposal in response to a RFP. If the Respondent is an individual, then that individual must complete and sign this Contractor Disclosure and Declaration Form where indicated. If the Respondent is a partnership (including but not limited to, joint venture partnership), then each partner in the partnership must complete and sign a separate Contractor Disclosure and Declaration Form where indicated. If the Respondent is an entity, then an authorized representative of that entity must complete and sign this Contractor Disclosure and Declaration Form where indicated. If the Respondent is a newly formed entity (formed within the last three years), then an authorized representative of that entity must complete and sign this Contractor Disclosure and Declaration Form where indicated, and each of the members or owners of the entity must also complete and sign separate Contractor Disclosure and Declaration Form where indicated.

Instructions: Provide the following information for the entity or individual completing this Form (the “Individual/Entity”).

A. Basic Information:

1. Name of Individual/Entity responding to this solicitation: _____

2. Name of the authorized representative for the responding Entity: _____

B. Individual/Entity Information:

1. Principal Office Address: _____

2. Telephone and Facsimile Numbers: _____
3. E-Mail Address: _____

4. Name and title of Contact Person for the Individual/Entity: _____

5. Is the Individual/Entity authorized to transact business in the State of Georgia?

YES (Attach documentation evidencing authority to transact business in the State of Georgia, not limited to Georgia Secretary of State documentation.)

NO

C. Questionnaire

If you answer "YES" to any of the following questions, you must provide on a separate page the details necessary to explain the nature and circumstances of each action, event, matter, relationship or practice involved, including but not limited to: names of persons or entities involved, status and/or outcome of each instance. Further, if the matter involves a criminal charge, litigation of any type, or other court or administrative charge or proceeding, then the name of the court or tribunal and the file or reference number must be provided. Any information must be provided on a separate page, attached to this form and submitted with your Bid.

1. Please describe the general development of the Respondent's business during the past ten (10) years, or such shorter period of time that the Respondent has been in business.

2. Are there any lawsuits, administrative actions or litigation to which Respondent is currently a party or has been a party (either as a plaintiff or defendant) during the past ten (10) years based upon fraud, theft, breach of contract, misrepresentation, safety, wrongful death or other similar conduct? If the answer to this question is "NO", then please proceed to question number 4. YES NO

3. If "yes" to question number 2, were any of the parties to the suit a bonding company, insurance company, an owner, or otherwise? If so, attach a sheet listing all parties and indicate the type of company involved. YES NO

4. Has the Respondent or any principal thereof, been charged with a criminal offense within the last ten (10) years? YES NO

5. Has the Respondent received any citations or notices of violation from any government agency in connection with any of Respondent's work during the past ten (10) years (including OSHA violations)? Describe any citation or notices of violation which Respondent received. YES NO

6. Please state whether any of the following events have occurred in the last ten (10) years with respect to the Respondent. If any answer is yes, explain fully the circumstances surrounding the subject matter of the affirmative answer: YES NO

(a) Whether Respondent, or Affiliate currently or previously associated with Respondent, has ever filed a petition in bankruptcy, taken any actions with respect to insolvency, reorganization, receivership, moratorium or assignment for the benefit of creditors, or otherwise sought relief from creditors? YES NO

- | | | |
|--|---------------------------------|--------------------------------|
| (b) Whether Respondent was subject of any order, judgment or decree not subsequently reversed, suspended or vacated by any court permanently enjoining Respondent from engaging in any type of business practice? | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| (c) Whether Respondent was subject of any order, judgment or decree not subsequently reversed, suspended or vacated by any court permanently enjoining Respondent from engaging in any type of business practice? | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| 7. Has any employee, agent or representative of Respondent who is or will be directly involved in the project, in the last ten (10) years: | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| a. directly or indirectly, had a business relationship with Invest Atlanta? | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| b. directly or indirectly, received revenues from Invest Atlanta? | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| c. directly or indirectly, received revenues from conducting business on Invest Atlanta property or pursuant to any contract with Invest Atlanta | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| 8. Whether any employee, agent, or representative of Respondent who is or will be directly involved in the project has or had within the last ten (10) years a direct or indirect business relationship with any elected or appointed Invest Atlanta official or with any Invest Atlanta employee? | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| 9. Whether Respondent has provided employment or compensation to any third-party intermediary, agent, or lobbyist to directly or indirectly communicate with any Invest Atlanta official or employee, or City of Atlanta official or employee in connection with any transaction or investment involving your firm and Invest Atlanta? | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| 10. Has the Respondent or any agent, officer, director, or employee been terminated, suspended, or debarred (for cause or otherwise) from any work being performed for Invest Atlanta, the City of Atlanta or any other Federal, State or Local Government? | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| 11. Has the Respondent, member of Respondent's team or officer of any of them (with respect to any matter involving the business practice or activities of his or her employer) been notified within the five (5) years preceding the date of this offer that any of them are the target of a criminal investigation, grand jury investigation, or civil enforcement proceeding? | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| 12. Please identify any Personal or Financial Relationships that may give rise to a conflict of interest as de fined below. [Please be advised that you may be ineligible for award of contract if you have a personal or financial relationship that constitutes a conflict of interest that cannot be avoided]: | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| (a) Personal relationships: executives, board members and partners in firms submitting offers must disclose familial relationships with employees, officers and elected officials of Invest Atlanta or the City of Atlanta. Familial relationships shall include spouse, mother, father, sister, brother, and natural or adopted children of an official or employee. | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |
| (b) Financial relationships: Respondent must disclose any interest held with an Invest Atlanta or City of Atlanta employee or official, or family members of an Invest Atlanta or City of Atlanta employee or official, which may yield, directly or indirectly, a monetary or other material benefit to the Respondent or the Respondent's family members. Please describe: | YES
<input type="checkbox"/> | NO
<input type="checkbox"/> |

D. REPRESENTATIONS

Certification of Independent Price Determination/Non-Collusion. Collusion and other anticompetitive practices among Respondents are prohibited by city, state and federal laws. All Respondents shall identify a person having authority to sign for the Respondent who shall certify, in writing, as follows:

“I certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting an or offer for the same supplies, labor, services, construction, materials or equipment to be furnished or professional or consultant services and is in all respects fair and without collusion or fraud. I understand collusive bidding is a violation of city, state and federal law and can result in fines, prison sentences, and civil damages awards. By signing this document, I agree to abide by all conditions of this solicitation and offer and certify that I am authorized to sign for this Respondent.”

Prohibition on Kickbacks or Gratuities/Non-Gratuity. The undersigned acknowledges the following prohibitions on kickbacks and gratuities:

- a. It is unethical for any person to offer, give or agree to give any employee or former employee a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy or other particular matter pertaining to any program requirement or a contract or subcontract or to any solicitation therefor.

- b. It is unethical for any employee or former employee to solicit, demand, accept or agree to accept from another person a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy or other particular matter pertaining to any program requirement or a contract or subcontract or to any solicitation therefor.

- c. It is also unethical for any payment, gratuity or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime Contractor or higher tier subcontractor or any person associated therewith as an inducement for the award of a subcontract or order.

Declaration continues on following page

Declaration

Under penalty of perjury, I declare that I have examined this Contractor Disclosure and Declaration Form and all attachments to it, if applicable, and, to the best of my knowledge and belief all statements contained herein and, in any attachments, if applicable, are true, correct and complete.

I certify that this offer is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting an offer for the same supplies, services, construction, or professional or consultant services, and is in all respects fair and without collusion or fraud. I understand collusive bidding is a violation of city, state and federal law and can result in fines, prison sentences, and civil damages awards. I agree to abide by all conditions of this solicitation and offer and certify that I am authorized to sign for this Respondent.

Sign here if you are an individual:

Printed Name: _____

Signature: _____

Date: _____, 20__

Subscribed and sworn to or affirmed by _____ **(name) this** _____ **day of** __, 20__.

Notary Public of _____ (state)

My commission expires: _____

Sign here if you are an authorized representative of a corporate entity, LLC, or partnership:

Printed Name of Corporate Entity, LLC or Partnership: _____

Signature of authorized representative: _____

Title: _____

Date: _____, 20__

Subscribed and sworn to or affirmed by _____ **(name),**
as the _____ **(title) of** _____ **(entity name) this** _____ **day of** _____
_____, 20__.

Notary Public of _____ (state)

My commission expires: _____

