

**REQUEST FOR PROPOSAL FOR LEGAL SERVICES**

For the City of Altoona Firemen's Pension Fund Board

**INQUIRIES AND PROPOSALS SHOULD BE EMAILED TO:**

Christopher McGuire,

[manager@altoonapa.gov](mailto:manager@altoonapa.gov)

I. GENERAL INFORMATION.

A. Purpose. This request for proposal (RFP) is to contract for legal services to be provided to the City of Altoona Firemen's Pension Board.

B. Who May Respond? Licensed PA Attorneys who have a background in pension law.

C. Instructions on Proposal Submission.

1. Closing Submission Date. Proposals must be submitted via email no later than 4:30 P.M, on August 29, 2025.

2. Inquiries. Inquiries concerning this RFP should be emailed to Christopher McGuire at [manager@altoonapa.gov](mailto:manager@altoonapa.gov)

3. Conditions of Proposal. All costs incurred in the preparation of a proposal to this RFP will be the responsibility of the Offeror and will not be reimbursed by the Firemen's Pension Board.

4. Right to Reject. The Firemen's Pension Board reserves the right to reject any and all proposals received in response to this RFP. A contract for the accepted proposal will be drafted based upon the factors described in this RFP.

5. Small and/or Minority-Owned Businesses. Efforts will be made by the City of Altoona to utilize small businesses, women and/or minority owned businesses. Offeror qualifies as a small business firm if it meets the definition of "small business" as established by the Small Business Administration (13 C.F.R. § 121.201).

6. Notification of Award. It is expected that selection of the successful Firm will be made within four (4) weeks of the closing date for the receipt of proposals. Upon conclusion of final negotiations with the successful Firm, all submitted RFP firms will be informed, via email, of the final results.

D. Description of Entity. The Altoona Firemen's Pension Fund Association, is in charge of the distribution of pensions and service increments of the Paid Firemen's Pension Fund for the members of the City of Altoona Fire Department, and shall designate the beneficiaries as directed by City Code.

II. SCOPE OF SERVICES. The Offeror shall be readily available to perform the following legal services, as requested by the City Manager and/or Fire Pension Board:

- Advising the Board on compliance with all applicable federal laws including all qualification issues affecting employee benefits.
- Advising the Board concerning drafting and compliance of plan documents, including State laws, rules, administrative policies, and procedures of the Plan administered by the Board.
- Providing specific, written recommendations on amendments to statutes, policies, and procedures to ensure the Plan is in full compliance with Internal Revenue Code qualification criteria and constitutional law.
- Preparing and filing plan documents for IRS qualification.
- Negotiating and drafting investment contracts, including contracts for alternative investments (e.g., private equity, real estate investments trusts and other alternative investment vehicles).

- Providing advice, review and drafting services concerning legal documents necessary to consummate investment transactions.
- Providing advice, review and drafting services relating to benefits administration and investment of fund assets.
- Providing sophisticated legal advice on federal tax and international tax matters, as necessary.
- Presenting legal opinions concerning benefits and investment transactions, including obtaining necessary opinions, letter rulings, and other documents from the Internal Revenue Service or other State or Federal regulatory or governing bodies as requested by the Board.
- Assisting in a variety of corporate governance matters including; legal research analysis, advice, and counsel, with respect to corporate and securities laws in connection with corporate governance initiatives.
- Providing legal opinions on fiduciary duties.
- Assisting in the communication of concerns involving Pension Fund issues to trustees, staff, consultants, advisors and other parties, including testifying before or responding to elected or appointed officials.
- Attending board meetings.
- Representing the Board in complex litigation regarding Plan issues.
- Providing legal opinions on benefits based on disability claims.

Although it is preferable for an attorney or firm to submit a proposal covering all of the above areas, the Firemen's Pension Board may consider proposals for subsets of these areas.

Offeror shall be prepared to submit detailed billing statements for all services billed at an hourly rate, if any, broken down into time increments of no more than a quarter hour. Offeror shall also include summaries of work performed and time spent on services performed under the flat monthly fee, as discussed below.

### III. PROPOSAL CONTENTS. All proposals shall include the following;

A. Legal Experience. The Offeror should describe its legal experience, including the names, addresses, contact persons, and telephone numbers of at least three clients, preferably including clients similar to the Firemen's Pension Board.

B. Organization, Size, Structure, and Areas of Practice. If the Offeror is a firm, it should describe its organization, size, structure, areas of practice, and office location(s). Indicate, if appropriate, if the firm is a small or minority/owned business. Also include copy of Equal Opportunity/Affirmative Action Policy, if the firm has one.

#### C. Attorney Qualifications and Experience.

1. Identify the principal attorney by name and give the year such attorney became licensed to practice law.

2. The number of years of experience with pension retirement funds.

3. Indicate the number of pension funds which the principal attorney has primary client responsibilities.

4. Identify other attorneys employed by the law firm who will assist in providing legal services to the fund and the number of years' experience.

D. Fees. The Offeror's proposed price should include information on the hourly billing rates of each attorney or other legal staff who is expected to work on this representation and charges for expenses, if any, such as legal research, copies, and faxes. Also include a monthly flat fee that would be charged to advise on routine matters that could be handled over the telephone or otherwise without extensive research or other legal work. The Firemen's Pension Board reserves the right to negotiate with the Offeror on the structure of the billing and/or retainer fee.

#### IV. PROPOSAL EVALUATION

A. Submission of Proposals. All proposals shall be emailed in either PDF or Word format to [manager@altoonapa.gov](mailto:manager@altoonapa.gov) no later than 4:30 P.M. on August 29, 2025 with the following subject: RFP For Legal Services For AFPB.

B. Evaluation Procedure and Criteria. The City Manager and Chairman of the Fireman's Pension Board will review proposals and make recommendations to the Fire Pension Board for final approval. The City Manager and/or Fire Pension Board may request a meeting with qualified Offerors prior to final selection. Proposals will be reviewed in accordance with the following criteria:

##### CRITERIA FOR REVIEWING THE PROPOSALS:

1. Proposed approach to scope of work.
2. Level of experience of the individual(s) identified to work on this matter.
3. The Offeror's experience with similar clients and legal matters.
4. Response from references.
5. Costs.
6. Interviews.