



# Memo

**To:** Town Council

**From:** Anthony Wilson, Town Manager

**Meeting date:** Nov. 20, 2023

**Re:** Real estate brokerage services

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The Town received one proposal in response to a Request for Proposals (RFP) for real estate brokerage services. We recommend awarding the contract to Homestead Realty, a local agency that has represented buyers or sellers in nearly 33% of real estate transactions in Winthrop over the past year, i.e. Homestead agents know the community.

The RFP was issued in response to a new state statute that requires municipalities to use a real estate broker in marketing and selling tax-acquired properties. Under the law, sparked by a U.S. Supreme Court decision, municipalities are entitled only to the back taxes, interest and associated costs when selling a foreclosed property; the prior owner receives the balance of the sale's proceeds.

Homestead Realty will conduct a market analysis of each tax-acquired property to determine a pricing strategy, to which the Town will agree. Every offer will be communicated to the Town, and Homestead will manage the process from beginning to end. Its fee will depend on the circumstances around the property and the sale. Again, the Town will not realize any of those costs.

Homestead's proposal is attached, as is the RFP.

The Town has initiated foreclosure procedures on 17 properties. Of those, two successfully completed foreclosures have been confirmed; those properties happen to yield the most value. Once a contract for brokerage services is executed, we will work with the Town's attorney and our real estate agent to begin the process of selling those properties. That would include sending a required 90-day notice of intent to sell the property to the former owner.

Further, we will work with the Town attorney on what more must be done with the 15 other properties to allow for their sale.



**Town of Winthrop, Maine  
Request for Qualifications**

**REAL ESTATE BROKERAGE SERVICES**

**Responses Due**

**4:00 PM MONDAY, NOV. 6, 2023**

at

Town Office

17 Highland Ave.

Winthrop, ME 04364

**Proposals will be publicly opened  
immediately after the submission deadline.**

**TOWN OF WINTHROP, MAINE  
REAL ESTATE BROKERAGE SERVICES**

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## 1. BACKGROUND

The Town of Winthrop ("Town") is seeking a real estate professional or company ("the Firm") to assist with selling certain Town-owned real estate determined to be surplus property. It is the intent of this Request for Qualifications (RFQ) to have the successful Firm enter into a Professional Services Contract with the Town to supply real estate services as outlined herein. The Firm is expected to meet the objectives of the Town, which includes in certain cases marketing lots to residential buyers intending to occupy affordable homes, or affordable housing developers to develop and manage the properties.

The Firm is expected to work closely with and provide regular reports to the Town Manager.

The Town reserves the right to reject any and all proposals, or parts of proposals, when it is judged to be in the best interest of the Town. Any award is subject to Purchasing Policy guidelines as adopted by the Winthrop Town Council on Sept. 11, 2023.

Responses will be evaluated based on their experience in real estate brokerage services in the Winthrop Lakes Region.

## 2. SCOPE OF SERVICES

The Town requests the following services:

- A. Act as seller's agent on behalf of the Town of Winthrop
- B. Develop a pricing and marketing strategy for the sale of Town-owned properties
- C. Work with the Town Manager and others to negotiate the sale of properties with buyers and prospects
- D. Coordinate real estate transaction closings
- E. Handle all other customary activities and services associated with real estate transactions

## 3. PROPOSAL SUBMISSION

- A. Firms must deliver two (2) copies of the proposal to the address below by the indicated deadline.

Winthrop Town Office  
17 Highland Ave.  
Winthrop, ME 04364

**DEADLINE: MONDAY, NOV. 6, 2023, 4:00PM**

**Proposals will be publicly opened immediately after the submission deadline.**

- B. Each response shall be submitted in a sealed envelope clearly marked with the Firm's name and "REAL ESTATE SERVICES" on the outside. Electronic format of proposals will not be accepted.
- C. Proposals that are incomplete, conditional or obscure, or which contain any additions not called for may be rejected by the Town.

- D. The Price Proposal must bear the written signature of a Firm representative who is duly authorized to bind the Offeror to the terms, conditions, and contracts associated with this RFQ.
- E. Any response may be withdrawn or withdrawn and resubmitted on request of the Firm up until the deadline. Responses may not be withdrawn after the deadline.

**4. QUESTIONS**

- A. Unless otherwise specified, questions pertaining to general information regarding this RFQ shall be addressed only in writing. No questions will be answered in-person or via telephone. Questions shall be mailed or emailed to:

Anthony Wilson  
Town Manager  
Town of Winthrop  
17 Highland Ave.  
Winthrop, ME 04364

[manager@winthropmaine.org](mailto:manager@winthropmaine.org)

Responses will be shared at [winthropmaine.org/bidsrfps](http://winthropmaine.org/bidsrfps).

- B. Written questions are due to the Town by Monday, Oct. 30, 2023, at 4:00 PM. Responses to submitted questions will be answered and posted in a subsequent addendum by Tuesday, Oct. 31, 2023, at 4:00 PM. Any questions received after Monday, Oct. 30, 2023, at 4:00 PM will not be answered.

**5. REQUIREMENTS**

The Firm must be able to meet the following requirements:

- A. Be a licensed real estate professional for no less than 2 years under the current Firm name.
- B. Have the resources and ability to consistently and effectively provide the requested services or any alternatives accepted by the Town.
- C. Procure and maintain insurance for the duration of the contract.
- D. Attend meetings with the Town designee, as deemed necessary by the Town, to coordinate and implement services.
- E. Provide the Town with reports, data, and information on real estate market trends and other information, as requested.

**6. REJECTION OF RESPONSES**

The Town reserves the right to reject any or all responses and/or to waive any informalities if deemed in the best interest of the Town to do so. The Town is the sole judge of its best interest.

**7. NEGOTIATIONS**

The Town may enter into negotiations with a selected Firm. If the Town cannot reach agreement on acceptable terms with the selected Firm within 60 days of notification of award, the Town reserves the right to end negotiations. If negotiations are ended, the Town may

choose to select the next ranked response, to cancel the RFQ and reject all proposals, and/or to reissue the RFQ at a later date, with or without modification.

## **8. PROPOSAL REQUIREMENTS**

Firms interested in serving as the Town's real estate broker must submit the following information in the order prescribed below. Additionally, submissions must include the Town of Winthrop Conflict of Interest Bid Disclosure Form. Each section should be separated by tabs or otherwise clearly marked. Submissions must be clearly organized using the structure below.

### **Section 1: Cover Letter and Contact Information**

- A. Include a cover letter that identifies the real estate team, outlines your team's interest in this opportunity, why your team is best qualified to serve as the Town's real estate broker, and how you envision the process for the disposition of Town-owned property.
- B. Identify the single point of contact with authority to make decisions (preferably executive level) for your organization with whom to communicate during the solicitation process, along with their contact information.

### **Section 2: Firm Qualifications & Experience**

- A. Organizational Structure: Indicate if the Firm is an individual, corporation, or partnership.
- B. Firms' Expertise: Provide an overview of the Firm's services provided in marketing real estate assets.
- C. Relevant Experience: Provide 3 to 5 examples of your experience in real estate marketing and brokerage services, highlighting any experiences in the Winthrop Lakes Region.
- D. Past and Current Litigation Disclosure: Provide documentation of all litigation actions taken against your firm, or related parties, in the past 5 years, including any ongoing and/or pending actions that may impact your firm's capacity to successfully perform the requested services, if selected.

### **Section 3: Proposed Services**

Please submit a clear proposal that adequately details the services provided and the manner in which they will be provided, including the following:

- A. Real estate market analysis
- B. Client consultation methods
- C. Marketing & pricing strategies
- D. Negotiation techniques
- E. Deal closing & transaction management

### **Section 4: Price Proposal**

# PRICE PROPOSAL FORM

Price Proposal should include all proposed rates, commissions, and fees. Include the following form with the Price Proposal.

- A. The undersigned proposes to furnish all labor and materials required for the Scope of Work in accordance with the RFQ for the amount or rates specified in the accompanied price proposal.
- B. The undersigned certifies that he/she has carefully examined this Request for Qualifications and can perform the work and furnish all the material called for in the manner prescribed therein and in accordance with the requirements of the Town of Winthrop.
- C. The undersigned hereby certifies that he/she is able to furnish labor that can work in harmony with all other elements of labor employed or to be employed on the work; and that he/she will comply fully with all laws and regulations.
- D. The undersigned further certifies under penalty of perjury that this price proposal is in all respects bona fide, fair, and made without collusion or fraud with any other person. As used in this subsection the word "person" shall mean any natural person, joint venture, partnership, corporation, or other business or legal entity.

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Name of Firm

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Business Address

---

City, State, Zip

---

Phone, Email

---

Name and Title of Individual Submitting Response

---

Signature

Date

**TOWN OF WINTHROP**  
**CONFLICT OF INTEREST BID DISCLOSURE FORM**

For purposes of determining any possible conflict of interest, all responders must disclose if the Town of Winthrop, Town Council members or Town employee(s) are owners, corporate officers, employees, etc. of their business.

Indicate either "Yes" (if a Town Council member or Town employee is associated with your business) or "No". If "Yes", give person(s) name(s) and position(s) with your business.

YES (list below)

NO

NAME(S)	POSITION(S)

COMPANY NAME: \_\_\_\_\_

BY (Printed Name): \_\_\_\_\_

BY (Signature): \_\_\_\_\_

TITLE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

\_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_

E-MAIL ADDRESS: \_\_\_\_\_





# SEALED PROPOSAL LOG

Project: Real Estate Brokerage Services RFQ

Opening date/time: Monday November 6, 2023, at 4:00 pm

Opened by: Anthony Wilson

Witnessed by: Deborah Nichols

	NAME	CONFLICT DISCLOSURE RECEIVED
1.	<u>Homestead Realty</u>	<input checked="" type="checkbox"/>
2.	<del>_____</del>	<input type="checkbox"/>
3.	<del>_____</del>	<input type="checkbox"/>
4.	<del>_____</del>	<input type="checkbox"/>
5.	<del>_____</del>	<input type="checkbox"/>
6.	<del>_____</del>	<input type="checkbox"/>
7.	<del>_____</del>	<input type="checkbox"/>
8.	<del>_____</del>	<input type="checkbox"/>
9.	<del>_____</del>	<input type="checkbox"/>

November 1, 2023

**Town of Winthrop  
17 Highland Avenue  
Winthrop, ME 04364**

To Whom it May Concern,

Homestead Realty LLC. is submitting this cover letter as notice that we are requesting that our proposal to be selected as the Town of Winthrop's Real Estate Firm of choice be looked upon favorably. Having been established and continuously located in Winthrop since 1983, Homestead Realty has been committed to the service and well being of Winthrop, surrounding towns, and its citizens.

Homestead Realty has seven agents currently working out of its Winthrop office at 3 Charles Street. While other offices may have more or less agents, none have established its right as the most active agency in the Town of Winthrop more so than Homestead Realty. Our agents represent a buyer or seller in more than 1 in every 4 homes sold in Winthrop over the past 5 years and beyond. Our scope of services has allowed us to reach buyers from within Maine and the United States, as well as other continents.

Homestead Realty will assign various Town of Winthrop listings to the agent best suited to serve each real estate transaction. Included in this list of brokers/agents who will be assisting are:

Pat Ladd	Broker	Licensed since 1986
Daren Hachey	Broker	Licensed since 2009
Stephanie Rioux	Broker	Licensed since 2010
Jackson Ladd	Sales Agent	Licensed since 2023
Lori Gray	Broker	Licensed since 1998
Dennis Tompkins	Associate Broker	Licensed since 2001



# HOMESTEAD REALTY

3 Charles Street  
Winthrop, ME 04364

207-377-7300  
fax 207-377-8574  
HomesteadRealtyMaine.com

The Town of Winthrop's listing will be treated with the same care and urgency as all of our listings. Homestead Realty's policy establishes that all listings are to receive client level services, and as an appointed agency licensed with the State of Maine, each listing will have an agent appointed to them.

Daren Hachey, owner of Homestead Realty, will be point of contact for the Town of Winthrop. He then will assign each listing to a specific agent to establish a client relationship.

Sincerely,

Daren Hachey

Realtor/Owner

Homestead Realty





**Section 2:**

- A. Homestead Realty LLC (Homestead Realty) is a Limited Liability Company established in Winthrop. As an appointed agency we are able to provide client services to both buyers and sellers.
- B. Homestead Realty belongs to the Kennebec Valley Board of Realtors, the Maine Association of Realtors, and the National Association of Realtors. By doing so, Homestead Realty is able to take advantage of the Multiple Listing Services (MLS) to reach buyers and sellers Worldwide. By immediately placing our listings in the MLS system, the properties are then marketed through dozens of real estate relevant websites. Real Estate is said to be "local", and to that end, we utilize various forms of print and digital media to advertise our client's properties near and far.
- C. In the past 12 months Homestead Realty has represented seller or buyer clients on nearly 33% of the home and land sales in Winthrop. During that same time period the sales price of Homestead Realty closed listings has varied from \$3,500 to \$800,000. I have included 5 examples of properties that we have sold for clients in the past year varying from Lakefront homes, to vacant land. Please see the attached sheets 1-5.
- D. There has been no litigation or mediation taken against Homestead Realty in the past 5 years. There are no pending or ongoing actions against Homestead Realty or any of its agents.

**Section 3:**

- A. Each agent will utilize all the tools available to them to produce a Comparable Market Analysis for the Town of Winthrop on each property listed.
- B. The agent will submit that Analysis to the Town of Winthrop designee and work with them to make an informed decision as to where the property is best suited to be priced in that current market. While our agents will inform the Town of Winthrop and its designee as to market conditions for each property, it will be the Town of Winthrop's decision as to the exact listing price.
- C. Once the pricing strategy is communicated and agreed upon, the necessary Brokerage Relationship Forms and Disclosures for each property will need to be completed. The property will then be entered into the Multiple Listing Services website we use for all listings and marketing in various media can begin. The marketing of each property will be unique to that property and will need to be active and fluid as market conditions warrant.
- D. Every offer brought to our agency on behalf of our clients is communicated as quickly as possible to the client so they can make an informed and timely decision. Negotiation and counter offers may need to be considered based on each offer received.
- E. The assigned agent will work with the Town of Winthrop to select a closing attorney and manage the process from start to finish. Homestead Realty does not offer legal advice, but works closely with our client's attorneys to bring them to a successful closing.



**HOMESTEAD  
REALTY**

3 Charles Street  
Winthrop, ME 04364

207-377-7300  
fax 207-377-8574  
HomesteadRealtyMaine.com

**Section 4:**

Pricing will be established per specific listing, and no fees shall be due until the successful closing of each listing. Homestead Realty has always been competitive with commission rates we have charged our clients which has lead to our market leading position. Due to Sherman Antitrust Laws, the rates shall not be discussed in this proposal. Rates will vary depending on the scope of the property and market conditions at that time. A listing that consists of a vacant piece of land will require a different fee structure than a step-up home listing, thus rates need to be reviewed case by case. The Town of Winthrop has the right to decline to work with Homestead Realty if agreeable terms are not defined.





**Cross Property Summary**



**164 Metcalf Road, Winthrop, ME 04364**

<b>List Number:</b>	1571157	<b>Status:</b>	Closed	<b>Bedrooms:</b>	2	<b>List Price:</b>	\$79,900
<b>Property Type:</b>	Residential	<b>Closed Date:</b>	10/06/2023	<b>Baths:</b>	1/0	<b>Full Tax Amt :</b>	\$960
<b>Type:</b>	Manufactured Home	<b>Price:</b>	\$75,500	<b>County:</b>	Kennebec	<b># Rooms:</b>	6
<b>Nbrhd/Assc:</b>		<b>Year Built:</b>	1969	<b>Heat Fuel:</b>	K-1/Kerosene;	<b>Lot Size Acres</b>	1.5
<b>Entrance Fee:</b>		<b>Basement:</b>	None		Wood	<b>Leased Land:</b>	No
						<b>SqFt Fin Above</b>	800

**Remarks:** Move right in! Well loved 6 room, 2 bedroom home with lots of character. 1.5 Acre lot with gardens and private back yard. Open kitchen/dining area with lots of sunlight. Warmed by free standing wood stove in living room. 2 Bedrooms and storage room for pantry and linens. Great yard with garden shed and potting area, patio and 2 additional storage sheds. Call for private showing!

**Directions:** Main Street Winthrop to Metcalf Road. Home on Left. See sign.  
**Listing Office:** Homestead Realty



**72 Greenwood Avenue, Winthrop, ME 04364-1522**

<b>List Number:</b>	1559681	<b>Status:</b>	Closed	<b>Bedrooms:</b>	3	<b>List Price:</b>	\$255,000
<b>Property Type:</b>	Residential	<b>Closed Date:</b>	06/22/2023	<b>Baths:</b>	1/1	<b>Full Tax Amt :</b>	\$3,215
<b>Type:</b>	Single Family Residence	<b>Price:</b>	\$289,360	<b>County:</b>	Kennebec	<b># Rooms:</b>	7
<b>Nbrhd/Assc:</b>		<b>Year Built:</b>	1934	<b>Heat Fuel:</b>	Oil	<b>Lot Size Acres</b>	0.72
<b>Entrance Fee:</b>		<b>Basement:</b>	Finished; Full; Sump Pump; Unfinished			<b>Leased Land:</b>	No
						<b>SqFt Fin Above :</b>	1,768

**Remarks:** Delightful three bedroom in-town Winthrop home with large yard and walking distance to downtown, library, schools and town beach. Classic features of original hardwood floors, formal dining room with built-ins and updated kitchen with breakfast bar, living room with fireplace for cozy nights has shining wood floors, adjacent sunroom perfect for at home office. Second story has front to back south facing primary bedroom, 2 guest rooms and full bath. Lower level family room with pine walls, and laundry room. Wonderful home for all your needs.

**Directions:** Main Street Winthrop to Greenwood Avenue. Home on Left. See sign.  
**Listing Office:** Homestead Realty



**L29, 38&39 Delaware Road, Winthrop, ME 04364**

<b>List Number:</b>	1546885	<b>Status:</b>	Closed	<b>County:</b>	Kennebec	<b>List Price:</b>	\$10,500
<b>Property Type:</b>	Land	<b>Pending Date:</b>	07/21/2023			<b>Full Tax Amt :</b>	\$107
<b>Nbrhd/Assc:</b>		<b>Entrance Fee:</b>				<b>Lot Size Acres</b>	1.59
		<b>Closed Date:</b>	09/12/2023			<b>+/-:</b>	
		<b>Price:</b>	\$7,000				

**Remarks:** Remote off grid living! this 1.59 acre lot is private but yet close to town. Perfect for hunting camp, or place to escape your everyday life! Near ITS snowmobile trail and Berry Pond. Looking for peace and quiet? This is it! Road is a paper street(road frontage is on the paper street), very minimally improved, no power to the site. Best to access lot by walking or with 4 wheeler. Cleared area on site for your future camp. No deeded access to the property.

**Directions:** Route 133 toward Wayne. Turn on Fellows Road follow to Right at first small Homestead Realty sign follow up hill take Left to property. road is accessible by 4-wheeler.

**Listing Office:** Homestead Realty (1105) 207-377-7300



**0 Turkey Lane, Winthrop, ME 04364**

<b>List Number:</b>	1481092	<b>Status:</b>	Closed	<b>County:</b>	Kennebec	<b>List Price:</b>	\$67,550
<b>Property Type:</b>	Land	<b>Pending Date:</b>	03/01/2021			<b>Full Tax Amt :</b>	\$1
<b>Nbrhd/Assc:</b>		<b>Date:</b>				<b>Lot Size Acres</b>	43
<b>Entrance Fee:</b>		<b>Closed Date:</b>	09/08/2023			<b>+/-:</b>	
		<b>Price:</b>	\$67,550				

**Remarks:** Looking for privacy? Looking to Build? 43 Peaceful acres with wildlife and Hoyt Brook running through! Just minutes to town or short commute to Augusta or Lewiston/Auburn.

**Directions:** Route 202 to Winthrop turn onto Old Lewiston Road take the first Right onto Turkey Lane. Sign is after mailbox for 373 Turkey Lane.

**Listing Office:** Homestead Realty (1105) 207-377-7300

Prepared by Daren Hachey on Monday, October 30, 2023 3:44 PM.

The information on MLS listings has been assembled from various sources of varying degrees of reliability. Any information that is critical to your buying decision should be independently verified. All dimensions are approximate and not guaranteed. Copyright Maine Listings © 2023 and FBS.





**87 Woodland Road, Winthrop, ME 04364**

<b>List Number:</b>	1559150	<b>Status:</b>	Closed	<b>Bedrooms:</b>	1	<b>List Price:</b>	\$192,500
<b>Property Type:</b>	Residential	<b>Closed Date:</b>	07/14/2023	<b>Baths:</b>	2/0	<b>Full Tax Amt :</b>	\$2,941
<b>Type:</b>	Single	<b>Price:</b>	\$175,000	<b>County:</b>	Kennebec	<b># Rooms:</b>	4
	Family			<b>Year Built:</b>	2004	<b>Lot Size Acres</b>	4.08
	Residence			<b>Heat Fuel:</b>	No Heat	<b>+/-:</b>	
<b>Nbrhd/Assc:</b>	Woodland Road Association			<b>Basement:</b>	Daylight; Fuel; Unfinished; Walkout Access	<b>Leased Land:</b>	No
<b>Entrance Fee:</b>						<b>SqFt Fin</b>	896
<b>Remarks:</b>	Looking for a private get away? This cottage was built in 2004 and needs your finishing touches. Main level has open concept living & dining room w/custom ceiling fan, bamboo floors, vaulted ceiling. Lovely custom kitchen with quartz counter, pantry, new appliances and more. The primary bedroom has large closet & adjacent full bath. Relax at days end on glassed-in porch or open deck and listen to the loons. Lower level has 2 studded bedrooms and full bath and family room and workshop. Lower level has electric wired in, new hot water heater (never used). All materials to finish home are on site. Baths not finished. Two additional lots with frontage on Berry Pond. Seller uses generator for power. Electric poles do not run to the property.						

**Directions:** From Rte 133 in Winthrop, follow 1.1 to stay Left on Rte 133 follow 3 to Fairbanks Rd, Left at end take Left on Old Winthrop Rd. Go .1 to left on Dexter Pond Rd, over bridge take Left 300' onto Old Turkey Ln, .2 miles to Left on Woodland Camp on Right

**Listing Office:** Homestead Realty

Prepared by Daren Hachey on Monday, October 30, 2023 3:44 PM.

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**TOWN OF WINTHROP**  
**CONFLICT OF INTEREST BID DISCLOSURE FORM**

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Indicate either "Yes" (if a Town Council member or Town employee is associated with your business) or "No". If "Yes", give person(s) name(s) and position(s) with your business.

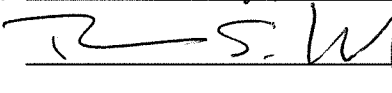
YES (list below)

NO

NAME(S)	POSITION(S)

COMPANY NAME: HOMESTRAD REALTY

BY (Printed Name): DAREN HACHEY

BY (Signature): 

TITLE: OWNER

ADDRESS: 3 CHARLES ST.

WINTHROP, ME 04364

PHONE NUMBER: 207-377-7300

E-MAIL ADDRESS: DHACHEY@FARIZPOINT.NET

# PRICE PROPOSAL FORM

Price Proposal should include all proposed rates, commissions, and fees. Include the following form with the Price Proposal.

- A. The undersigned proposes to furnish all labor and materials required for the Scope of Work in accordance with the RFQ for the amount or rates specified in the accompanied price proposal.
- B. The undersigned certifies that he/she has carefully examined this Request for Qualifications and can perform the work and furnish all the material called for in the manner prescribed therein and in accordance with the requirements of the Town of Winthrop.
- C. The undersigned hereby certifies that he/she is able to furnish labor that can work in harmony with all other elements of labor employed or to be employed on the work; and that he/she will comply fully with all laws and regulations.
- D. The undersigned further certifies under penalty of perjury that this price proposal is in all respects bona fide, fair, and made without collusion or fraud with any other person. As used in this subsection the word "person" shall mean any natural person, joint venture, partnership, corporation, or other business or legal entity.

HOMESTEAD REALTY

Name of Firm

3 CHARLE ST.

Business Address

WINTHROP, ME 04364

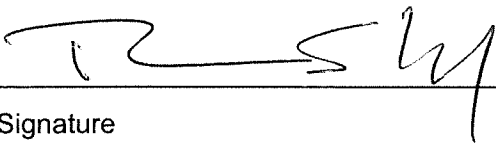
City, State, Zip

207-377-2300 DHACHEY@FAIRPORT.NET

Phone, Email

DAREN HACHEY OWNER

Name and Title of Individual Submitting Response



Signature

11/6/23

Date