



Department of Administration  
Purchasing Division  
2019 Washington Street East  
Post Office Box 50130  
Charleston, WV 25305-0130

# State of West Virginia Master Agreement

Order Date: 08-17-2021

CORRECT ORDER NUMBER MUST  
APPEAR ON ALL PACKAGES, INVOICES,  
AND SHIPPING PAPERS. QUESTIONS  
CONCERNING THIS ORDER SHOULD BE  
DIRECTED TO THE DEPARTMENT  
CONTACT.

Order Number:	CMA 1300 1300 STO180000002E 5	Procurement Folder:	330243
Document Name:	Professional Auditing Services for UP	Reason for Modification:	Change Order No 4 - To renew the contract under the same terms and conditions.
Document Description:	Professional Auditing Services for UP		
Procurement Type:	Central Master Agreement		
Buyer Name:			
Telephone:			
Email:			
Shipping Method:	Vendor	Effective Start Date:	2017-10-06
Free on Board:		Effective End Date:	2022-10-05

VENDOR	DEPARTMENT CONTACT																				
<b>Vendor Customer Code:</b> 000000100899 KELMAR ASSOCIATES LLC 500 EDGEWATER DR STE 525  WAKEFIELD MA 01880 US <b>Vendor Contact Phone:</b> 781-213-6926 <b>Extension:</b> 207  <b>Discount Details:</b> <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			<b>Requestor Name:</b> Shelly Murray <b>Requestor Phone:</b> (304) 341-7089 <b>Requestor Email:</b> shelly.murray@wvsto.com  <b>22</b> <b>FILE LOCATION</b> _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

INVOICE TO	SHIP TO
WEST VIRGINIA STATE TREASURERS OFFICE 322 70TH ST SE  CHARLESTON WV 25304  US	WEST VIRGINIA STATE TREASURERS OFFICE 322 70TH ST SE  CHARLESTON WV 25304  US

8-24-21  
PAT  
Purchasing Division's File Copy

Total Order Amount:

Open End

JLH 8/19/2021  
PURCHASING DIVISION AUTHORIZATION

DATE: Tana 8/23/2021  
ELECTRONIC SIGNATURE ON FILE

ATTORNEY GENERAL APPROVAL AS TO FORM

DATE: [Signature]  
ELECTRONIC SIGNATURE ON FILE

ENTERED

ENCUMBRANCE CERTIFICATION

DATE: Beverly Toler 8.30.21  
ELECTRONIC SIGNATURE ON FILE

**Extended Description:**

Change Order

Change Order No. 4 is issued to renew the original contract according to all terms, conditions, prices and specifications contained in the original contract including all authorized change orders.

Effective date of renewal 10/06/2021 through 10/05/2022

Renewal Years Remaining: Zero (0)

No other changes.

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price	
1	84111600			LS	0.000000	
	Service From	Service To				

**Commodity Line Description:** Audit services

**Extended Description:**



## State of West Virginia

OFFICE OF THE STATE TREASURER

PHONE: 304-558-5000 or 1-800-422-7498

[www.wvtreasury.com](http://www.wvtreasury.com)

RILEY MOORE  
STATE TREASURER

STATE CAPITOL, ROOM E-145  
1900 KANAWHA BOULEVARD, EAST  
CHARLESTON, WV 25305

August 3, 2021

Mr. Mike Gizzi  
Kelmar Associates LLC  
500 Edgewater Drive Suite 525  
Wakefield, MA 01880

Subject: CMA STO180000002E Professional Auditing Services for UP / Change Order #4 Renewal

The West Virginia State Treasurer's Office is offering to renew subject contract under the same terms, conditions and pricing as contained in the original agreement including all authorized change orders. The renewal dates are 10/06/2021 through 10/05/2022. If your company agrees to this renewal, please sign below and return the original to my attention as soon as possible for processing. Attached is a copy of the Affidavit which is also required to be signed, dated, and notarized in order to process the above renewal. Also, please provide your updated required insurance certificates.

Should you have any questions about this letter, please feel free to give me a call.

Very truly yours,

*Shelly Murray, CPPB*

Deputy Treasurer of Purchasing  
West Virginia State Treasurer's Office  
Phone: 304-341-7089

Email: [shelly.murray@wvsto.com](mailto:shelly.murray@wvsto.com) / [purchasing@wvsto.com](mailto:purchasing@wvsto.com)

We agree to renew the contract for the period as stated above under the same terms and conditions in the original purchase order and any change orders thereto.

  
Mark S. McQuillen

Name/Signature

August 10, 2021

Date

President, CEO & Member

Title



STATE OF WEST VIRGINIA  
Purchasing Division  
**PURCHASING AFFIDAVIT**

**CONSTRUCTION CONTRACTS:** Under W. Va. Code § 5-22-1(i), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

**ALL CONTRACTS:** Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

**EXCEPTION:** The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

**DEFINITIONS:**

**"Debt"** means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.

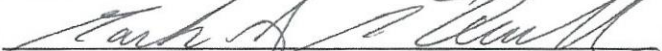
**"Employer default"** means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

**"Related party"** means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

**AFFIRMATION:** By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

**WITNESS THE FOLLOWING SIGNATURE:**

Vendor's Name: Kelmar Associates, LLC

Authorized Signature:  Date: August 10, 2021

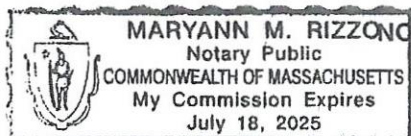
State of Massachusetts

County of Middlesex, to-wit:

Taken, subscribed, and sworn to before me this 10 day of August, 2021.

My Commission expires July 18, 2025.

**AFFIX SEAL HERE**



**MARYANN M. RIZZOTTO** NOTARY PUBLIC

Notary Public

COMMONWEALTH OF MASSACHUSETTS

My Commission Expires

July 18, 2025



Purchasing Affidavit (Revised 01/19/2018)

## West Virginia Secretary of State — Online Data Services

### Business and Licensing

Online Data Services Help

### Business Organization Detail

*NOTICE: The West Virginia Secretary of State's Office makes every reasonable effort to ensure the accuracy of information. However, we make no representation or warranty as to the correctness or completeness of the information. If information is missing from this page, it is not in the The West Virginia Secretary of State's database.*

### KELMAR ASSOCIATES, LLC

Organization Information									
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason	
LLC   Limited Liability Company	11/6/2007		11/6/2007	Foreign	Profit				

Organization Information			
<b>Business Purpose</b>	5416 - Professional, Scientific and Techincal Servies - Professional, Scientific and Techincal Servies - Management, Scientific and Tech Consulting Services (administrative, general, HR, marketing, process, physical distribution, logistics, environmental)		<b>Capital Stock</b>
<b>Charter County</b>	Kanawha	<b>Control Number</b>	98004
<b>Charter State</b>	DE	<b>Excess Acres</b>	
<b>At Will Term</b>	A	<b>Member Managed</b>	MBR
<b>Par Value</b>			



<b>At Will Term Years</b>	
<b>Authorized Shares</b>	<b>Young Entrepreneur</b> Not Specified

<b>Addresses</b>	
Type	Address
<b>Designated Office Address</b>	500 EDGEWATER DRIVE, SUITE 525 WAKEFIELD, MA, 01880
<b>Mailing Address</b>	500 EDGEWATER DRIVE, STE 525 WAKEFIELD, MA, 01880 USA
<b>Notice of Process Address</b>	5098 WASHINGTON ST W STE 407 Charleston, WV, 25313-1561
<b>Principal Office Address</b>	500 EDGEWATER DRIVE, STE 525 WAKEFIELD, MA, 01880 USA
Type	Address

<b>Officers</b>	
Type	Name/Address
<b>Member</b>	DAVID P KENNEDY 500 EDGEWATER DRIVE, STE 525 WAKEFIELD, MA, 01880
<b>Member</b>	MICHAEL J LEBLANC 500 EDGEWATER DRIVE, STE 525 WAKEFIELD, MA, 01880
<b>Member</b>	MARK S. MCQUILLEN 500 EDGEWATER DRIVE, STE 525 WAKEFIELD, MA, 01880
<b>Member</b>	MARK X RUSSO 500 EDGEWATER DRIVE, SUITE 525 WAKEFIELD, MA, 01880
Type	Name/Address

<b>Annual Reports</b>	
<b>Filed For</b>	
2021	
2020	
2019	
2018	
2017	
2016	
2015	
2014	
2013	
2012	
2011	
2010	
2009	
2008	
<b>Date filed</b>	

For more information, please contact the Secretary of State's Office at 304-558-8000.

Thursday, August 19, 2021 — 3:45 PM

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