



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: 12-15-2021

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 0203 3810 CPR2100000002 2	Procurement Folder:	881748
Document Name:	Third Party Administrator (TPA) Services for TDC	Reason for Modification:	Change Order No.1 is issued for administrative purposes only, to correct the erroneous effective start date of this reassignment. See extended description.
Document Description:	Third Party Administrator (TPA) Services for TDC		
Procurement Type:	Central Master Agreement		
Buyer Name:			
Telephone:			
Email:			
Shipping Method:	Best Way	Effective Start Date:	2021-08-01
Free on Board:	FOB Dest, Freight Prepaid	Effective End Date:	2022-12-31

VENDOR				DEPARTMENT CONTACT	
Vendor Customer Code:	VS0000037932			Requestor Name:	Cynthia L Adkins
EMPOWER RETIREMENT LLC 8515 E ORCHARD RD				Requestor Phone:	(304) 558-3570
GREENWOOD VILLAGE CO 80111 US				Requestor Email:	cindy.l.adkins@wv.gov
Vendor Contact Phone:	7705473419	Extension:		<div style="font-size: 48pt; font-weight: bold;">22</div> <div style="font-size: 24pt; font-weight: bold;">FILE LOCATION _____</div>	
Discount Details:					
	Discount Allowed	Discount Percentage	Discount Days		
#1	No	0.0000	0		
#2	No				
#3	No				
#4	No				

INVOICE TO	SHIP TO
CONSOLIDATED PUBLIC RETIREMENT 4101 MACCORKLE AVE SE CHARLESTON WV 25304 US	CONSOLIDATED PUBLIC RETIREMENT 4101 MACCORKLE AVE SE CHARLESTON WV 25304 US

12-27-21 Bar

Purchasing Division's File Copy

Total Order Amount:	Open End
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ENTERED

TKP 12/20/2021

PURCHASING DIVISION AUTHORIZATION
 DATE: *Tara* 12/21/21
 ELECTRONIC SIGNATURE ON FILE

ATTORNEY GENERAL APPROVAL AS TO FORM
 DATE: *John S. Gray*
 ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
 DATE: *Beverly Tolson* 1-26-22
 ELECTRONIC SIGNATURE ON FILE

1/5/2022

Extended Description:

Change Order No. 1

Change Order No.1 is issued for administrative purposes only, to correct the erroneous start date of this reassigned contract, per the Amendment to the Services Agreement.

The original contract, including all terms, conditions, prices, specifications, and change orders contained therein remain in full force and effect.

Vendor Now: Empower Retirement LLC
8515 E Orchard Rd
7T2 Corp Tax Dept
Greenwood Village, CO 80111
wvOASIS No.: 0000037932
New procurement folder: 881748

Great West Life & Annuity Insurance Company
8515 E Orchard Rd
7T2 Corp Tax Dept
Greenwood Village, CO 80111
wvOASIS No.: 00000228335
Procurement folder No.: 575316

Effective date of change August 1, 2021
No other changes.

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
1	80161500				0.000000
	Service From	Service To			
	2021-08-01	2022-12-31			

Commodity Line Description: Third Party Administrator Services (TPA)

Extended Description:

Third Party Administrator Services (TPA) for the Teachers Defined Contribution (TDC) Retirement Plan

AMENDMENT
to the
SERVICES AGREEMENT
for
West Virginia Consolidated Public Retirement Board
Group No. 98977

THIS AMENDMENT is entered into by and between Great-West Life & Annuity Insurance Company ("GWL&A") and West Virginia Consolidated Public Retirement Board (hereinafter referred to as the "Board" or "CPRB") with respect to the recordkeeping services provided by GWL&A to the West Virginia Teachers Defined Contribution Plan (hereinafter referred to as the "Plan" or "Plans"), effective August 1, 2021.

WHEREAS, GWL&A and Board have entered into an agreement for recordkeeping and communication services ("Agreement"), as amended, under which GWL&A provides certain recordkeeping and communication services for the Board with respect to the Plan; and

WHEREAS, GWL&A and Board have decided to amend the Agreement to effectuate an assignment of the contract from GWL&A to its wholly-owned subsidiary, Empower Retirement, LLC;

NOW, THEREFORE, in consideration of the covenants and conditions herein contained, and other good and valuable consideration as herein provided, the parties amend the Agreement as follows:

- 1. GWL&A hereby assigns all rights and obligations under the Agreement to Empower Retirement, LLC.**
- 2. Empower Retirement, LLC hereby accepts assignment and delegation of all of GWL&A's rights, duties, responsibilities, liabilities, obligations and interest under the Agreement and hereby assumes toward Board from and after the Effective Date all duties, responsibilities, liabilities, and obligations heretofore owing Board by GWL&A under the Agreement.**
- 3. Board hereby consents to the assignment of the Agreement by GWL&A to Empower Retirement, LLC and assumes toward Empower Retirement, LLC from and after the Effective Date all duties, responsibilities, liabilities and obligations heretofore owing GWL&A under the Agreement.**
- 4. In all other respects, the Agreement shall remain in full force and effect.**
- 5. This Amendment shall take effect on August 1, 2021, (the "Effective Date").**

IN WITNESS WHEREOF, the parties, by signing this Amendment, certify that they have read and understood it, that they agree to be bound by its terms, and that they have the authority to sign it.



Pettrey, Melissa K <melissa.k.pettrey@wv.gov>

Fwd: Rejected PRM

1 message

Adkins, Cindy L <cindy.l.adkins@wv.gov>
 To: Melissa K Pettrey <melissa.k.pettrey@wv.gov>

Mon, Nov 29, 2021 at 1:41 PM

Good afternoon Melissa

Please see the correspondence below concerning our contract with Empower. This is the vendor that changed their name from Great West to Empower, that you worked on for us this past summer. Would you take a look and let me know exactly what I need to do on my end to get this back over to you and get this change made that the Auditors office is requiring before they will pay our invoice?

The old contract number for Great West is CMA - CPR20*01
 The new contract number for Empower is CMA - CPR21*02

----- Forwarded message -----

From: **Cottrill, Lori A** <lori.a.cottrill@wv.gov>
 Date: Mon, Nov 29, 2021 at 12:43 PM
 Subject: Fwd: Rejected PRM
 To: Cindy Adkins <cindy.l.adkins@wv.gov>
 Cc: John D Galloway <john.d.galloway@wv.gov>, Tracy L Batman <tracy.l.batman@wv.gov>

The Auditor's Office has rejected the Great West/Empower invoices again. These are the 2 that were split because of the contract change. Below is what they are saying needs to be done. I can take care of the first invoice (the one with the end date of 06/14/21). Can you please let me know when these changes are made so I can process the other invoice again?

----- Forwarded message -----

From: **David Hughes** <david.hughes@wvsao.gov>
 Date: Mon, Nov 29, 2021 at 12:27 PM
 Subject: RE: Rejected PRM
 To: Cottrill, Lori A <lori.a.cottrill@wv.gov>
 Cc: Auditing-List <Auditing@wvsao.gov>

Hi Lori,

Mr. Sull and I were looking over this payment and upon review of the two contracts, we noticed the following:

CMA CPR20*001 (Great West Life & Annuity Insurance Company)

- The effective end date on change order 1 was entered as 06/15/2021
- On page 2 of the change order 1 – Extended Description has the effective date of change June 15, 2021
- On page 3 of the CMA CPR20*001, change order 1, Amendment to the SERVICES AGREEMENT for West Virginia Consolidated Public Retirement Board Group No. 98977

Item 5 states *This Amendment shall take effect on August 1, 2021 (the Effective Date)*

- This contract would need a change order to change the end date to 07/31/2021 which would cover all invoices up to this time period

CMA CPR21*002 (Employer Retirement LLC)

- The start date was entered as 06/15/2021
- The second and third bullet points above are the same on this new contract number
- The contract would need a change order to change the start date to 08/01/2021 as per the signed amendment

The first invoice (IN 22*46791) can be processed for the time period April 01 – June 14, 2021, but the second invoice would need to be processed after the change orders are done to correct the dates as mentioned above. This would then be processed on an ADO referencing the original CMA since it would be ending on 07/31/2021.

Just a quick note on the new name and contract - the vendor will need to correct their invoices to match wvOASIS and the CMA CPR21*002.

If you have any questions or would like to discuss with us on the phone please let us know a date/time to set up a telephone call with you.

Thank you,

David C. Hughes

Contract Audit Supervisor

West Virginia State Auditor's Office

Phone: 304-558-2261 Ext. 2206

John B. McCuskey

West Virginia State Auditor

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From: Cottrill, Lori A <lori.a.cottrill@wv.gov>
Sent: Monday, November 29, 2021 9:44 AM
To: David Hughes <david.hughes@wvsao.gov>
Subject: Rejected PRM

You rejected PRM 2200017959. We will supply the potential duplicate invoice form. Regarding the invoices with the name changes, how should we handle this? One invoice is for the period of time their name was Great West and the other invoice is for the period when their name changed to Empower. Please let us know how these invoices need to be processed so we can get this vendor paid as soon as possible.

-

Lori A. Cottrill, Accounting Manager

WV Consolidated Public Retirement Board

4101 MacCorkle Avenue, SE

Charleston, WV 25304

1.304.558.3570 ext 52443

1.800.654.4406

lori.a.cottrill@wv.gov

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Lori A. Cottrill, Accounting Manager

WV Consolidated Public Retirement Board

4101 MacCorkle Avenue, SE


Charleston, WV 25304

1.304.558.3570 ext 52443

1.800.654.4406

lori.a.cottrill@wv.gov

2 attachments

 **EMPOWER - 2021.06.15-2021.06.30 - \$8,721.17.pdf**
99K

 **EMPOWER - 2021.04.01-2021.06.14 - \$43,605.82.pdf**
100K