



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: 09-02-2025

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 STO230000001D 4	Procurement Folder:	1141013
Document Name:	Professional Audit Services for Unclaimed Property	Reason for Modification:	Change Order 03 To Renew Contract
Document Description:	Audit Services for Unclaimed Property		
Procurement Type:	Central Master Agreement		
Buyer Name:			
Telephone:			
Email:			
Shipping Method:	Best Way	Effective Start Date:	2022-12-01
Free on Board:	FOB Dest, Freight Prepaid	Effective End Date:	2026-11-30

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: VS0000011389 TREASURY SERVICES GROUP LLC 215 S George St York PA 17401-5501 US Vendor Contact Phone: 4026827260 Extension: 700 Discount Details: <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			Requestor Name: Kevin L Bowling Requestor Phone: 304-558-5000 Requestor Email: lee.bowling@wvsto.com 2026 FILE LOCATION _____
	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

CR 9-24-25

Total Order Amount:	Open End
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Purchasing Division's File Copy

NEW 9/24/25

PURCHASING DIVISION AUTHORIZATION
DATE: <i>MunX</i> - 9/24/2025
ELECTRONIC SIGNATURE ON FILE

ATTORNEY GENERAL APPROVAL AS TO FORM
DATE: <i>9-24-25</i>
ELECTRONIC SIGNATURE ON FILE

9/30/2025

ENCUMBRANCE CERTIFICATION
DATE: <i>9-30-25</i>
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Change Order

Change Order No. 03 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 12/01/2025 through 11/30/2026

Renewal Years Remaining: 1

No other changes

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
1	84111600				0.000000
Service From		Service To		Service Contract Amount	
				0.00	

Commodity Line Description: Audit services

Extended Description:

Audit/Collection of Property per section 4.1.21 of Specifications. Rate shall not exceed 10.5% As per vendors affirmation on Exhibit A Pricing Page as attached.

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
2	84111600				0.000000
Service From		Service To		Service Contract Amount	
				0.00	

Commodity Line Description: Audit services

Extended Description:

Audit / Voluntary Compliance Program per section 4.2.10 of Specifications. Rate shall be flat rate of 9% As per vendors affirmation on Exhibit A Pricing Page as attached.

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
3	84111600				0.000000
Service From		Service To		Service Contract Amount	
				0.00	

Commodity Line Description: Audit services

Extended Description:

Audit /Other Services per section 4.3.1 of Specifications. Rate shall not exceed \$100 per hour. As per vendors affirmation on Exhibit A Pricing Page as attached.



State of West Virginia

OFFICE OF THE STATE TREASURER

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

www.wvtreasury.com

LARRY PACK
STATE TREASURER

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

August 5, 2025

Via Electronic Communication

Shane Osborn, CEO (sosborn@treasuryservicesgroup.com)

Treasury Services Group, LLC.

215 S George St
York, PA 17401

Subject: Audit Services for Unclaimed Property – Contract Renewal Request – Contract CMA
STO23*001

The WV State Treasurer's Office is offering to renew subject contract for an additional One Year period under the same terms, conditions as contained in the original contract. The dates of renewal will be 12/01/2025 through 11/30/2026. If your company agrees to this renewal, please sign below and return to my attention as soon as possible for processing (email, fax, or US Postal Service).

Sincerely,

Lee Bowling

Director of Purchasing

Phone: 304-341-0752 / Fax: 304-340-1518

Email: lee.bowling@wvsto.gov / purchasing@wvsto.gov

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

Name/Signature

06AUG25

Date

CEO

Title

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Business Organization Detail

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TREASURY SERVICES GROUP, LLC

Organization Information								
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
LLC Limited Liability Company	5/24/2017		5/24/2017	Foreign	Profit			

Organization Information			
Business Purpose	5412 - Professional, Scientific and Technical Services - Professional, Scientific and Technical Services - Accounting/Tax Prep/Bookkeeping/Payroll Services (CPAs)		Capital Stock
Charter County		Control Number	0
Charter State	DE	Excess Acres	
At Will Term	A	Member	
At Will Term Years		Pa	Hi, I'm SOLO! I can help you file your Annual Report.
Authorized Shares		Entrepreneur	Not Specified

Addresses

Type	Address
Designated Office Address	235 N. DUKE ST SUITE 300 LANCASTER, PA, 17602
Mailing Address	235 N. DUKE ST SUITE 300 LANCASTER, PA, 17602 USA
Notice of Process Address	INCorp SERVICES, INC. 5098 WASHINGTON STREET WEST SUITE 407 CHARLESTON, WV, 25313
Principal Office Address	235 N. DUKE ST SUITE 300 LANCASTER, PA, 17602 USA
Type	Address

Officers

Type	Name/Address
Member	SHANE OSBORN 215 S. GEORGE ST. YORK, PA, 17401
Type	Name/Address

Annual Reports

Filed For
2025
2024
2023
2022
2021
2020
2019
2018
Date filed

Hi, I'm SOLO! I can help you file your Annual Report.

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

Wednesday, September 24, 2025 — 7:58 AM

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Report.

Vendor/Customer


Address

Address Type	Street 1	City	State/Province	Zip/Postal Code	Principal Contact
✓ Payment	215 S GEORGE ST	YORK	PA	17401	Marlene Ward
Payment	235 N DUKE ST	LANCASTER	PA	17602	Marlene Ward
Billing	215 S George St	York	PA	17401-5501	Shane Osborn
Payment	215 S George St	York	PA	17401-5501	Marlene Ward
Ordering	215 S George St	York	PA	17401-5501	Shane Osborn
Web Registrar	215 S George St	York	PA	17401-5501	Shane Osborn













First Prev Next Last

Save [Undo](#) [Delete](#) [Insert](#) [Copy](#) [Paste](#) Vendor/Customer : VS0000011389
TREASURY SERVICES GROUP LLCActive From : 10/11/2017 Address Type : Payment Active To : Division/Department : Default Record : Additional Address Info. : Mail Returned : Prevent New Spending : 

Active Address : Yes

Default Currency : USD - US Dollar 

▼ Address Information

Address ID :	AD000001 	Country Phone Code :	
Street 1 :	215 S GEORGE ST	Phone :	000-000-0000
Street 2 :		Phone Extension :	
City :	YORK	County :	
State/Province :	PA 	County Name :	
Zip/Postal Code :	17401	Country :	US 
DUNS :			
Extended DUNS :			
Unique Entity Identifier :			
CAGE Code :			

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▶ Remittance Advice

▶ Contact Information


▶ Contact Address Information

▶ Geographic Designation

▶ Change Management


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Aug 15, 2025



Records Retention Policy Impacts Old SAM Registration Data Show Details

May 21, 2025



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"Treasury services group" 


Entity 


Location 


Status 

☒ Active

☐ Inactive

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All Entity Information

Entities

Disaster Response Registry

Responsibility / Qu



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