



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: 10-28-2024

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

<b>Order Number:</b>	CMA 1300 1300 STO230000001C 3	<b>Procurement Folder:</b>	1141210
<b>Document Name:</b>	Professional Audit Services for Unclaimed Property	<b>Reason for Modification:</b>	Change Order 02 To Renew Contract
<b>Document Description:</b>	Audit Services for Unclaimed Property		
<b>Procurement Type:</b>	Central Master Agreement		
<b>Buyer Name:</b>			
<b>Telephone:</b>			
<b>Email:</b>			
<b>Shipping Method:</b>	Best Way	<b>Effective Start Date:</b>	2022-12-01
<b>Free on Board:</b>	FOB Dest, Freight Prepaid	<b>Effective End Date:</b>	2025-11-30

VENDOR		DEPARTMENT CONTACT	
<b>Vendor Customer Code:</b>	VS0000005676	<b>Requestor Name:</b>	Kevin L Bowling
Discovery Audit Services LLC 7515 JEFFERSON HWY #244		<b>Requestor Phone:</b>	304-558-5000
		<b>Requestor Email:</b>	lee.bowling@wvsto.com
BATON ROUGE	LA 70806	<h1>2025</h1> <p>FILE LOCATION _____</p>	
US			
<b>Vendor Contact Phone:</b>	2259289175 <b>Extension:</b>		
<b>Discount Details:</b>			
	<b>Discount Allowed</b>	<b>Discount Percentage</b>	<b>Discount Days</b>
#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 10-29-24*

Purchasing Division's File Copy

<b>Total Order Amount:</b>	Open End
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*TLW 10/28/24*  
**PURCHASING DIVISION AUTHORIZATION**  
 DATE: *Munk* 10/29/2024  
 ELECTRONIC SIGNATURE ON FILE

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

**ENCUMBRANCE CERTIFICATION**  
*Cady*  
 DATE: 10-30-24  
 ELECTRONIC SIGNATURE ON FILE

*10/30/2024*

**Extended Description:**

Change Order

Change Order No. 02 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 12/01/2024 through 11/30/2025

Renewal Years Remaining: 2

No other changes

Line	Commodity Code	Manufacturer	Model No	Unit	Unit Price
1	84111600				0.000000
	<b>Service From</b>	<b>Service To</b>		<b>Service Contract Amount</b>	
				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
	<b>Service From</b>	<b>Service To</b>		<b>Service Contract Amount</b>	
				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
	<b>Service From</b>	<b>Service To</b>		<b>Service Contract Amount</b>	
				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

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

RILEY MOORE
STATE TREASURER

September 13, 2024
Via Electronic Communication

J. King Woolf, III, President (kwoolf@discoveryauditservicesllc.com)
Discovery Audit Services, LLC.
7515 Jefferson HWY #244
Baton Rouge, LA 70806

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 12/01/2024 through 11/30/2025. 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
Purchasing Agent
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.

King Woolf
Name/Signature

9-16-24
Date

Managing Member
Title

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## West Virginia Secretary of State — Online Data Services

### Business and Licensing

Online Data Services Help

### Business Organization Detail

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### DISCOVERY AUDIT SERVICES, LLC

Organization Information								
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
LLC   Limited Liability Company	9/25/2017		9/25/2017	Foreign	Profit			

Organization Information			
<b>Business Purpose</b>	5419 - Professional, Scientific and Technical Servies - Professional, Scientific and Technical Servies - Other Professional/Scientific/Technical Services (marketing research, public opinion polling, photographic, translation & interpretation, veterinary services)		<b>Capital Stock</b>
<b>Charter County</b>		<b>Control Number</b>	0
<b>Charter State</b>	LA	<b>Excess Acres</b>	X Close
<b>At Will Term</b>	A	<b>M</b>	Hi, I'm SOLO! I can help you file your Annual Report.
<b>At Will Term Years</b>		<b>Pa</b>	

**Authorized  
Shares**

**Young  
Entrepreneur**

Not Specified

### Addresses

Type

Address

**Designated Office  
Address**

7515 JEFFERSON HWY #244  
BATON ROUGE, LA, 70806

**Mailing Address**

7515 JEFFERSON HWY #244  
BATON ROUGE, LA, 70806  
USA

**Notice of Process  
Address**

J. KING WOOLF, III  
7515 JEFFERSON HWY #244  
BATON ROUGE, LA, 70806

**Principal Office  
Address**

7515 JEFFERSON HWY #244  
BATON ROUGE, LA, 70806  
USA

Type

Address

### Officers

Type

Name/Address

**Member**

JOHN WOOLF  
7515 JEFFERSON HWY #244  
BATON ROUGE, LA, 70806

**Member**

CHRISTINE WOOLF  
7515 JEFFERSON HWY #244  
BATON ROUGE, LA, 70806

Type

Name/Address

### Annual Reports

Filed For

2024

2023

2022

2021

2020

2019

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

2018

Date filed

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

Tuesday, October 29, 2024 — 8:37 AM

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you file your Annual  
Report.



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*Sep 17, 2024*



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Disaster Response Registry

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# COMPLIANCE VERIFICATION CHECKLIST FOR REQUISITION SUBMISSION

<i>Purchasing Division Use:</i> Buyer: <u>TW-09</u> Date: <u>10/28/24</u>  Solicitation No. <u>CMA STO 23-001 C</u>	Agency: State Treasurer's Office  Procurement Officer Submitting Requisition: Kevin "Lee" Bowling, Jr.  Requisition No. CMA 1300 STO23*001C - Change Order No. 02  PF No.: 1141210
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This checklist **MUST** be completed by a state agency's designated procurement officer and submitted with the Purchase Requisition to the Purchasing Division. The purpose of the checklist is to verify that an agency procurement officer has obtained and included required documentation necessary for the Purchasing Division to process the requisition without future processing disruptions. At the agency's preference, the agency **MUST** either submit the checklist by attaching it to the requisition's Header **OR** by placing it in the requisition's Procurement Folder.

## FOR ALL SOLICITATION TYPES:

#	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
1	Specifications and Pricing Page included	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Use of correct specification template	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Use of correct requisition type [CRQS → CCT or CPO] or [CRQM → CMA]	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Use of most current terms and conditions ( <a href="http://www.state.wv.us/admin/purchase/TCP.pdf">www.state.wv.us/admin/purchase/TCP.pdf</a> )	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Maximum budgeted amount in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Suggested vendors in wvOASIS	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Capitol Building Commission pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Financing (Governor's Office) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	Fleet Management Division pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Compliance Check Type	Required	Provided, if Required	Not Required	Purch. Div. Confirmation
10	Insurance requirements				
	Commercial General Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Automobile Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Workers' Compensation/Employer's Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Cyber Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Builder's Risk/Installation Floater	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Professional Liability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Other (specify)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	Office of Technology CIO pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	Treasurer's Office (banking) pre-approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**FOR CHANGE ORDERS/RENEWALS:**

1	Two-party agreement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Standard change order language	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Office of Technology CIO approval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	Justification for price increases/backdating/other	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Bond Rider (Construction)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	Secretary of State Verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
7	State debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
8	Federal debarment verification	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

*\*The items pre-checked are required before a Purchase Requisition may be submitted to the Purchasing Division. Failure to complete and verify this documentation may result in rejection of the requisition back to the agency. It is up to the agency procurement officer to determine if pre-approvals, insurance, or other documentation is needed for the purchase. The referenced information below may be used to make this determination.*

*For Purchasing Division Use Only:*

I have reviewed the requisition identified above and find that it is sufficient to advertise publicly to the vendor community. My review does not preclude the possibility that the vendor community, or some other entity, will identify an area of concern; however, should such issues or concerns arise, they will be reviewed and addressed as may be appropriate.

Signature: \_\_\_\_\_

