



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: 10-09-2024

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 STO230000001H 3	Procurement Folder:	1142020
Document Name:	Professional Audit Services for Unclaimed Property	Reason for Modification:	Change Order 02 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:	2025-11-30

VENDOR		DEPARTMENT CONTACT	
Vendor Customer Code:	000000163205	Requestor Name:	Kevin L Bowling
KROLL GOVERNMENT SOLUTIONS LLC 500 CHASE PKWY		Requestor Phone:	304-558-5000
WATERBURY CT 06708 US		Requestor Email:	lee.bowling@wvsto.com
Vendor Contact Phone:	999-999-9999 Extension:	<div style="font-size: 2em; font-weight: bold;">2025</div> <div style="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
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

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

TW 10/29/24

PURCHASING DIVISION AUTHORIZATION
 DATE: *Munkitf 10/29/2024*
 ELECTRONIC SIGNATURE ON FILE

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

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

103062024

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
	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

RILEY MOORE
STATE TREASURER

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

September 13, 2024
Via Electronic Communication

Joseph Marcelonis, Managing Director (joseph.marcelonis@kroll.com)
Kroll Government Solutions, LLC.
500 Chase Pkwy
Waterbury, CT 06708

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.


Name/Signature Steven Haley

9/16/2024
Date

Managing Director
Title

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Business Organization Detail

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Kroll Government Solutions, LLC

Organization Information								
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
LLC Limited Liability Company	12/16/2011		12/16/2011	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	Berkeley	Control Number	99SCU
Charter State	DE	Excess Acres	
At Will Term	A	Member	X Close
At Will Term Years		Pa	Hi, I'm SOLO! I can help you file your Annual Report.
Authorized Shares		Y	Entrepreneur Not Specified

Addresses

Type	Address
Designated Office Address	500 CHASE PARKWAY WATERBURY, CT, 06708
Mailing Address	500 CHASE PARKWAY WATERBURY, CT, 06708
Notice of Process Address	CORPORATE CREATIONS NETWORK INC. 126 EAST BURKE STREET MARTINSBURG, WV, 25401
Principal Office Address	500 CHASE PARKWAY WATERBURY, CT, 06708 USA
Type	Address

Officers

Type	Name/Address
Member	KROLL GOVERNMENT SOLUTIONS HOLDING, LLC 500 CHASE PARKWAY WATERBURY, CT, 06708
Type	Name/Address

Name Changes

Date	Old Name
2/19/2021	Verus Analytics LLC
3/6/2018	VERUS FINANCIAL LLC
Date	Old Name

Date	Amendment
2/19/2021	B4WV Name Change From:
3/6/2018	B4WV Name Change From:
4/29/2016	CORRECTION FILED CHAI MANAGED TO MEMBER-M
Date	Amendment

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GER-

Annual Reports

Filed For
2024
2023
2022
2021
2020
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2018
2017
2016
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2013
2012
Date filed

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

Tuesday, October 29, 2024 — 9:13 AM

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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 570 23 001 H</u>	Agency: State Treasurer's Office Procurement Officer Submitting Requisition: Kevin "Lee" Bowling, Jr. Requisition No. CMA 1300 STO23*001H - Change Order No. 02 PF No.: 1142020
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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 (www.state.wv.us/admin/purchase/TCP.pdf)	<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: _____

