



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: 11-07-2023

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 2	<b>Procurement Folder:</b>	1141210
<b>Document Name:</b>	Professional Audit Services for Unclaimed Property	<b>Reason for Modification:</b>	Change Order 01 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>	2024-11-30

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
BATON ROUGE LA 70806 US				<b>Requestor Email:</b>	lee.bowling@wvsto.com
<b>Vendor Contact Phone:</b>	2259289175	<b>Extension:</b>		<div style="font-size: 48pt; font-weight: bold;">24</div> <div style="font-weight: bold;">FILE LOCATION</div>	
<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

11-9-23 BAT

<b>Total Order Amount:</b>	Open End
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Purchasing Division's File Copy

ENTERED

TW 11/8/23

<b>PURCHASING DIVISION AUTHORIZATION</b>
DATE: <i>Mark O'Neil - 11/08/2023</i>
ELECTRONIC SIGNATURE ON FILE

<b>ATTORNEY GENERAL APPROVAL AS TO FORM</b>
DATE: <i>John L. Gray</i>
ELECTRONIC SIGNATURE ON FILE

<b>ENCUMBRANCE CERTIFICATION</b>
<i>Beverly Tolson</i>
DATE: <i>11-20-23</i>
ELECTRONIC SIGNATURE ON FILE

11/20/2023

**Extended Description:**

Change Order

Change Order No. 01 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 12/01/2023 through 11/30/2024

Renewal Years Remaining: 3

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

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

RILEY MOORE  
STATE TREASURER

October 6, 2023

Via Electronic Communication

J. King Woolf, III, President ([kwoolf@discoveryauditservicesllc.com](mailto: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 12/01/2023 through 11/30/2024. 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). **Also, please provide a copy of your current certificate of liability insurance in the amounts required in the original contract.**

Sincerely,

Lee Bowling

Purchasing Agent

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

Email: [lee.bowling@wvsto.gov](mailto:lee.bowling@wvsto.gov) / [purchasing@wvsto.gov](mailto: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.*

J. King Woolf III  
Name/Signature

10-6-23

Date

Managing Member

Title