



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.

Order Number:	CMA 1300 1300 STO230000001G 2	Procurement Folder:	1141037
Document Name:	Professional Audit Services for Unclaimed Property	Reason for Modification:	Change Order 01 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:	2024-11-30

VENDOR				DEPARTMENT CONTACT		
Vendor Customer Code:	000000100899			Requestor Name:	Kevin L Bowling	
KELMAR ASSOCIATES LLC				Requestor Phone:	304-558-5000	
500 EDGEWATER DR STE 525				Requestor Email:	lee.bowling@wvsto.com	
WAKEFIELD	MA	01880	<div style="font-size: 48px; font-weight: bold;">24</div> <div style="font-weight: bold;">FILE LOCATION</div>			
US						
Vendor Contact Phone:	781-213-6926	Extension:				207
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

11-9-23 BAT

Purchasing Division's File Copy

Total Order Amount:	Open End
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ENTERED

TW 11/8/23

PURCHASING DIVISION AUTHORIZATION
 DATE: *M. Alex - 11/08/2023*
 ELECTRONIC SIGNATURE ON FILE

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

ENCUMBRANCE CERTIFICATION
Beverly Tolson
 DATE: *11-20-23*
 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
	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

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

RILEY MOORE
STATE TREASURER

October 6, 2023
Via Electronic Communication

David Kennedy, General Counsel & Member (David.Kennedy@kelmarassoc.com)
Kelmar Associates, LLC.
500 Edgewater Dr., STE 525
Wakefield, MA 01880

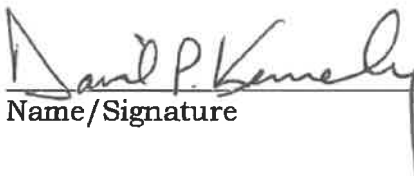
Subject: Audit Services for Unclaimed Property – Contract Renewal Request – Contract
CMA STO23*001

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 / 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

October 6, 2023
Date

General Counsel & Member
Title