GENERAL SERVICES ADMINISTRATION

Federal Supply Service
Authorized Federal Supply Schedule Price List

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through GSA Advantage™, a menu-driven database system. The INTERNET address for GSA Advantage™ is: http://www.GSAAdvantage.gov.

Schedule for - Multiple Award Schedule (MAS)
Federal Supply Group: Professional Services  Class:
PSC: R704
Contract Number: 47QRAA19D005L

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at http://www.gsa.gov/schedules-ordering

Contract Period: March 10, 2019 – March 9, 2024

Price list current as of Modification # PS-A812 effective February 25, 2020

Contractor: TTerry Consulting, LLC
DBA The Terry Group
130 E Randolph St, Suite 2810
Chicago, IL 60601 6207

Business Size: Small Business

Telephone: 847-420-5203
FAX Number: 312-574-1519
Web Site: www.terrygroup.com
E-mail: carol.navin@terrygroup.com
Contract Administration: Carol Navin

CUSTOMER INFORMATION:

1a. Table of Awarded Special Item Number(s) with appropriate cross-reference to page numbers:

<table>
<thead>
<tr>
<th>SIN</th>
<th>SIN Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>541611</td>
<td>Management and Financial Consulting, Acquisition and Grants</td>
</tr>
<tr>
<td>and</td>
<td>Management Support, and Business Program and Project Management Services</td>
</tr>
<tr>
<td>541611 RC</td>
<td></td>
</tr>
<tr>
<td>OLM</td>
<td>Order Level Materials</td>
</tr>
</tbody>
</table>
1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract. This price is the Government price based on a unit of one, exclusive of any quantity/dollar volume, prompt payment, or any other concession affecting price. Those contracts that have unit prices based on the geographic location of the customer, should show the range of the lowest price, and cite the areas to which the prices apply.

1c. If the Contractor is proposing hourly rates a description of all corresponding commercial job titles, experience, functional responsibility and education for those types of employees or subcontractors who will perform services shall be provided. If hourly rates are not applicable, indicate “Not applicable” for this item.

2. Maximum Order: $1,000,000.00

3. Minimum Order: $100.00

4. Geographic Coverage (delivery Area): Domestic Only

5. Point(s) of production (city, county, and state or foreign country): Same as company address

6. Discount from list prices or statement of net price: Government net prices (discounts already deducted).

7. Quantity discounts: 1% volume discount for orders over $500,000

8. Prompt payment terms: Net 30 days. Information for Ordering Offices: Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.

9a. Notification that Government purchase cards are accepted up to the micro-purchase threshold: Yes

9b. Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold: Yes

10. Foreign items (list items by country of origin): None

11a. Time of Delivery (Contractor insert number of days): Specified on the Task Order

11b. Expedited Delivery:. The Contractor will insert the sentence “Items available for expedited delivery are noted in this price list..” under this heading. The Contractor may use a symbol of its choosing to highlight items in its price list that have expedited delivery: Contact Contractor

11c. Overnight and 2-day delivery. The Contractor will indicate whether overnight and 2-day delivery are available. Also, the Contractor will indicate that the schedule customer may contact the Contractor for rates for overnight and 2-day delivery: Contact Contractor

11d. Urgent Requirements. The Contractor will note in its price list the “Urgent Requirements” clause of its contract and advise agencies that they can also contact the Contractor’s representative to effect a faster delivery: Contact Contractor

12. F.O.B Points(s): Destination

13a. Ordering Address(es): Same as company address
13b. **Ordering procedures:** For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA’s) are found in Federal Acquisition Regulation (FAR) 8.405-3.

14. **Payment address(es):** Same as company address

15. **Warranty provision.:** Contractor’s standard commercial warranty.

16. **Export Packing Charges (if applicable):** N/A

17. **Terms and conditions of Government purchase card acceptance (any thresholds above the micro-purchase level):** Contact Contractor

18. **Terms and conditions of rental, maintenance, and repair (if applicable):** N/A

19. **Terms and conditions of installation (if applicable):** N/A

20. **Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable):** N/A

20a. **Terms and conditions for any other services (if applicable):** N/A

21. **List of service and distribution points (if applicable):** N/A

22. **List of participating dealers (if applicable):** N/A

23. **Preventive maintenance (if applicable):** N/A

24a. **Environmental attributes, e.g., recycled content, energy efficiency, and/or reduced pollutants:** N/A

24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g. contractor’s website or other location.) The EIT standards can be found at: [www.Section508.gov/](http://www.Section508.gov/). N/A

25. **Data Universal Numbering System (DUNS) number:** 033384460

26. **Notification regarding registration in System for Award Management (SAM) database:**

27. **Final Pricing:**
The rates shown below include the Industrial Funding Fee (IFF) of 0.75%.

<table>
<thead>
<tr>
<th>Item</th>
<th>SIN</th>
<th>Awarded Labor Category</th>
<th>Site</th>
<th>GSA Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>541611</td>
<td>Analyst I</td>
<td>Both</td>
<td>$168.77</td>
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<tr>
<td>2</td>
<td>541611</td>
<td>Analyst II</td>
<td>Both</td>
<td>$253.15</td>
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<tr>
<td>3</td>
<td>541611</td>
<td>Analyst III</td>
<td>Both</td>
<td>$286.90</td>
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<tr>
<td>4</td>
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<td>Actuary I</td>
<td>Both</td>
<td>$438.79</td>
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<tr>
<td>5</td>
<td>541611</td>
<td>Actuary II</td>
<td>Both</td>
<td>$472.54</td>
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<tr>
<td>6</td>
<td>541611</td>
<td>CEO</td>
<td>Both</td>
<td>$633.40</td>
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<tr>
<td>7</td>
<td>541611</td>
<td>Principal</td>
<td>Both</td>
<td>$506.30</td>
</tr>
</tbody>
</table>
LABOR CATEGORY DESCRIPTIONS

**Analyst I**  
**Description:** Possesses strong analytical and organizational skills to perform modeling and data analysis projects with minimal supervision. Utilizes data-driven models and programs. Prepares analysis, reports and client exhibits. Performs self-review of work product.  
**Minimum Education:** Bachelors  
**Minimum Experience:** 1 year

**Analyst II**  
**Description:** Possesses strong analytical, organizational and communication skills to perform modeling and data analysis projects independently. Updates and utilizes data-driven models and programs. Prepares analysis, reports and client presentations. Manages multiple projects, reviews work of more junior staff and participates in client discussions and meetings.  
**Minimum Education:** Bachelors  
**Minimum Experience:** 4 years

**Analyst III**  
**Description:** Possesses depth and breadth in one or more areas of employee benefits and retirement industry planning, finance and administration. Capable of reviewing analysis, reports and client presentations. Manages multiple projects. Reviews work of more junior team members and applies own judgment and expertise. Leads client projects including setting timelines, communicating project status, preparing and reviewing work and presenting results. Manages own work flow and coordinates work of more junior team members.  
**Minimum Education:** Bachelors  
**Minimum Experience:** 8 years

**Actuary I**  
**Description:** Possesses depth and breadth in multiple areas of employee benefits and retirement industry strategy, planning, finance and administration. Possesses considerable experience in complex project management and organizational development. Leads overall client relationships and strategy including assisting clients in defining scope of work, contracting, and the delivery of services. Responsible for directing and managing workflow for the team and ensuring appropriate quality review. Responsible for actuarial services related to retirement.  
**Minimum Education:** Bachelors  
**Minimum Experience:** 18 years  
**Certifications:** ASA, EA

**Actuary II**  
**Description:** Possesses depth and breadth in multiple areas of employee benefits and retirement industry strategy, planning, finance and administration. Possesses considerable experience in complex project management and organizational development. Experienced in advising on matters pertaining to large, complex systems. Leads key client relationships and strategy. Manages scope of work, contracting and delivery of services. Acts in the capacity of actuarial leadership and new business development. Responsible for directing overall workflow management and ensuring appropriate quality review. Provides innovation, thought leadership and problem solving to organizations. Responsible for actuarial services related to retirement.  
**Minimum Education:** Bachelors
Minimum Experience: 22 years
Certifications: FSA, MAAA, EA

Principal
Description: Possesses deep actuarial and analytical expertise and experience applying it across a wide range of client organizations and projects in the retirement area. Responsible for actuarial technical leadership. Contributes to overall business strategy, develops and leads new business activity, implementation and ongoing management. Experienced in advising on matters pertaining to large, complex systems. Guides cross-functional teams through complex analysis and decision-making processes. Identifies and develops advanced modeling techniques to a broad range of risk management challenges. Facilitates the development, implementation and achievement of strategic business goals and objectives.

Minimum Education: PhD
Minimum Experience: 16 years
Certifications: FSA, MAAA, EA

CEO
Description: Overall lead for the firm. Acts as a leading actuary to bridge the gap between modern analytics and cutting-edge actuarial science, for both traditional and non-traditional industries and applications. Acts as a strategist working with client organizations, bringing exceptional resources to bear in helping solve the most complex problems across a broad spectrum of projects including actuarial analysis and data analytics. Active leader in the actuarial profession in the U.S. and internationally.

Minimum Education: Masters
Minimum Experience: 40 years
Certifications: FSA, MAAA, EA

Substitutions:
1) In any case where a PhD is specified, six years of directly related job experience (in addition to Bachelor’s degree) may be substituted.
2) In any case where a Master’s Degree is specified, two years of directly related job experience (in addition to Bachelor’s degree) may be substituted.
3) In any case where a Bachelor’s Degree is specified, 4 years directly related job experience may be substituted.
4) In any case where an Enrolled Actuary (EA) is specified, 1-year equivalent dedicated subject matter and directly related job experience may be substituted.

Service Contract Act: The Service Contract Labor Standards (SCLS) are applicable to this contract as they apply to the entire Schedule and all services provided. While no specific labor categories have been identified as being subject to SCLS due to exemptions for professional employees (FAR 22.1101, 22.1102 and 29 CRF 541.300), this contract still maintains the provisions and protections for SCLS eligible labor categories. If and / or when the contractor adds SCLS labor categories / employees to the contract through the modification process, the contractor must inform the Contracting Officer and establish a SCLS matrix identifying the GSA labor category titles, the occupational code, SCLS labor category titles and the applicable WD number. Failure to do so may result in cancellation of the contract.