Schedule MAS- Multiple Award Schedule
Federal Supply Group: Professional Services

700 CENTRAL EXPY S STE 550
ALLEN, TX 75013-8125
P: (913) 491-3388 F: (913) 642-9777
www.lewisellis.com

Contract Number: 47QRAA22D004F
Contract Period: January 07, 2022 through January 06, 2042
Pricelist current through Modification: PS-A815 dated January 8, 2022
Business Size: Large Business

Contact for Contract Administration:
Cabe Chadick, FSA, MAAA
President & Managing Principal
cchadick@lewisellis.com

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

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at www.gsa.gov
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22a. SPECIAL ATTRIBUTES SUCH AS ENVIRONMENTAL ATTRIBUTES

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23. Unique Entity Identifier (UEI) Number:

24. NOTIFICATION REGARDING REGISTRATION IN SYSTEM FOR AWARD MANAGEMENT (SAM) DATABASE:
Lewis & Ellis, Inc. is a full service actuarial and management consulting firm. We have extensive experience in financial analysis, insurance product development, valuation, and auditing for most types of insurance. In addition to the consulting services, we also have a suite of actuarial software available for sale. Please see our web site at www.lewisellis.com for a complete description of the services we offer.

Since L&E was founded in 1968, we have charted a course of significant growth built on dedication to professional competence, integrity, and service. We currently have over 40 actuaries serving clients coast-to-coast in all facets of life, health and property & casualty insurance operations, regulatory compliance, employee benefits, expert testimony, and life settlements. Our reach is supported by offices in Dallas, Kansas City, London, Baltimore, Denver and Indianapolis.

Innovative computing technology has been a cornerstone of our ability to provide cost-effective solutions to difficult problems. We have developed a suite of Windows-based actuarial software to assist our consultants and outside actuaries in completing many of their activities in an efficient and effective manner. This includes an actuarial pricing and projection system, a statutory and tax reserve factor generator for traditional life plans, an exposure study and Monte Carlo simulation system for traditional life insurance, and a life settlement pricing system. L&E continues to improve and upgrade its existing portfolios of software, while at the same time developing new applications that will allow insurance professionals to manage their responsibilities more effectively.

In Honor of our 50th Anniversary please read the highlights of our history
### 1a. TABLE OF AWARDED SPECIAL ITEM NUMBERS (SINs):

<table>
<thead>
<tr>
<th>SIN</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>541611</td>
<td>Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services</td>
</tr>
<tr>
<td>OLM</td>
<td>Order-Level Materials (OLM)</td>
</tr>
</tbody>
</table>

Examples of Complementary Financial Management Services include but are not limited to:

- Perform actuarial services and/or actuarial data analysis services
  - Collection, analysis, editing, calibration, and data entry of Employee Benefit Plan information
- Perform economic and regulatory analyses
  - Develop methods for analyzing costs, benefits and impacts of regulations and policies
  - Collect data and prepare Information Collection Requests for approval by OMB
  - Conduct exposure and risk analyses
  - Develop, modify, or apply risk characterization models to analyze and evaluate policies, programs, and regulations
- Assess and improve financial management systems
- Assist with implementation of corrective actions
- Document systems
- Identify systems requirements
- Plan and develop systems
- Assist in meeting agency financial management system requirements
- Assess and improve financial reporting and analysis
- Develop new reporting formats and pro-forma financial reports
- Assist in improving and streamlining reporting and analysis processes
- Perform cost-benefit or other special financial analyses
- Assist with the requirements of the Government Performance & Results Act
- Assist with devising and implementing performance measures and related processes and systems
- Assist with strategic and operational financial planning
- Resolve audit recommendations
- Assist in managerial cost accounting
- Assist in financial policy formulation and development
- Assist with quality assurance efforts
1b. **LOWEST PRICED MODEL NUMBER AND PRICE FOR EACH SIN:**
N/A. Services Only

1c. **HOURLY RATES: (Services Only):**

<table>
<thead>
<tr>
<th>SIN</th>
<th>Labor Category</th>
<th>Minimum Education</th>
<th>Minimum Years of Experience</th>
<th>Year 1 GSA Price w/IFF</th>
<th>Year 2 GSA Price w/IFF</th>
<th>Year 3 GSA Price w/IFF</th>
<th>Year 4 GSA Price w/IFF</th>
<th>Year 5 GSA Price w/IFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>541611</td>
<td>Junior Actuarial Technician</td>
<td>Bachelors</td>
<td>1</td>
<td>$149.00</td>
<td>$151.38</td>
<td>$153.80</td>
<td>156.26</td>
<td>$158.76</td>
</tr>
<tr>
<td>541611</td>
<td>Actuarial Technician</td>
<td>Bachelors</td>
<td>2</td>
<td>$171.00</td>
<td>$173.74</td>
<td>$176.34</td>
<td>$179.34</td>
<td>$182.21</td>
</tr>
<tr>
<td>541611</td>
<td>Senior Actuarial Technician</td>
<td>Bachelors</td>
<td>3</td>
<td>$204.27</td>
<td>$207.54</td>
<td>$210.86</td>
<td>$214.23</td>
<td>$217.66</td>
</tr>
<tr>
<td>541611</td>
<td>Staff Actuary</td>
<td>Bachelors</td>
<td>5</td>
<td>$280.48</td>
<td>$284.97</td>
<td>$289.53</td>
<td>$294.16</td>
<td>$298.87</td>
</tr>
<tr>
<td>541611</td>
<td>Junior Managing Actuary</td>
<td>Bachelors</td>
<td>3</td>
<td>$210.00</td>
<td>$213.36</td>
<td>$216.77</td>
<td>$220.24</td>
<td>$223.77</td>
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<tr>
<td>541611</td>
<td>Senior Managing Actuary</td>
<td>Bachelors</td>
<td>20</td>
<td>$484.00</td>
<td>$491.74</td>
<td>$499.61</td>
<td>$507.61</td>
<td>$515.73</td>
</tr>
</tbody>
</table>

**The Service Contract Labor Standards:** The Service Contract Labor Standards (SCLS), formerly the Service Contract Act (SCA), is applicable to this contract as it applies to the entire Multiple Award 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 Wage Determination Number(s). Failure to do so may result in cancellation of the contract.
Labor Categories

**Junior Actuarial Technician**
Actuarial staff member with a minimum of 1 year of applicable experience to the project, who is junior to other staff Actuarial Technicians and who has not reached Associateship as defined by the Society of Actuaries. Supports Actuaries in their Service delivery.  
Minimum Education: Bachelors

**Actuarial Technician**
Actuarial staff member with a minimum of 2 years of applicable experience to the project, who is junior to other staff Actuarial Technicians and who has not reached Associateship as defined by the Society of Actuaries. Supports Actuaries in their Service delivery.  
Minimum Education: Bachelors

**Senior Actuarial Technician**
Actuarial staff member with a minimum of 3 years of applicable experience to the project, who has reached the Associateship or similar level, but has not yet reached Fellowship as defined by the Society of Actuaries.  
Minimum Education: Bachelors

**Staff Actuary**
Actuarial staff member with more than 5 years of applicable experience to the particular project. Sound understanding of actuarial processes and objectives Significant client contact and interaction, substantial actuarial contributions to client presentations and listed author of client reports. Participation in professional actuarial meetings.  
Minimum Education: Bachelors

**Junior Managing Actuary**
Actuary with a minimum of 3 years of management expertise necessary for overseeing the particular project. Sound understanding of actuarial processes, professional standards, and objectives Significant client contact and interaction, substantial actuarial contributions to client presentations and listed author of client reports. Participation in professional actuarial meetings.  
Minimum Education: Bachelors
Senior Managing Actuary
Actuary with a minimum of 20 years of marketing development experience and management expertise necessary for overseeing the particular project. Expert understanding of actuarial processes, professional standards, and objectives. Significant client contact and interaction, substantial actuarial contributions to client presentations and listed author of client reports. Participation in professional actuarial meetings.
Minimum Education: Bachelors

2. **MAXIMUM ORDER:**

<table>
<thead>
<tr>
<th>SIN</th>
<th>MAXIMUM ORDER LIMIT</th>
</tr>
</thead>
<tbody>
<tr>
<td>541611</td>
<td>$1,000,000.00</td>
</tr>
<tr>
<td>OLM</td>
<td>$250,000</td>
</tr>
</tbody>
</table>

3. **MINIMUM ORDER:**
$100.00

4. **GEOGRAPHIC COVERAGE:**
Domestic Only

5. **POINT(S) OF PRODUCTION:**
Lewis & Ellis, Inc., Overland Park, KS; Allen, TX; and London, England

6. **DISCOUNT FROM LIST PRICES:**
Prices are listed as GSA Net, Discount Deducted and IFF included.

7. **QUANTITY DISCOUNT(S):**
None Offered

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.

9. **FOREIGN ITEMS:**
None

10a. **TIME OF DELIVERY:**
As agreed in task order.

10b. **EXPEDITED DELIVERY:**
N/A
10c. **OVERNIGHT AND 2-DAY DELIVERY:**
As agreed in task order.

10d. **URGENT REQUIREMENTS:**
As agreed in task order.

11. **FOB POINT:**
Destination

12a. **ORDERING ADDRESS:**
Lewis & Ellis, Inc.
700 CENTRAL EXPY S STE 550
ALLEN, TX 75013-8125
P: 913-491-3388
F: 913-642-9777

12b. **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.

13. **PAYMENT ADDRESS:**
Lewis & Ellis, Inc.
700 CENTRAL EXPY S STE 550
ALLEN, TX 75013-8125
P: 972-850-0850
F: 972-850-0851

14. **WARRANTY PROVISION:**
N/A

15. **EXPORT PACKING CHARGES:**
N/A

16. **TERMS AND CONDITIONS OF RENTAL, MAINTENANCE, AND REPAIR (IF APPLICABLE):**
N/A

17. **TERMS AND CONDITIONS OF INSTALLATION (IF APPLICABLE):**
N/A

18a. **TERMS AND CONDITIONS OF REPAIR PARTS INDICATING DATE OF PARTS PRICE LISTS AND ANY DISCOUNTS FROM LIST PRICES (IF AVAILABLE):**
N/A

18b. **TERMS AND CONDITIONS FOR ANY OTHER SERVICES (IF APPLICABLE):**
N/A
19. LIST OF SERVICE AND DISTRIBUTION POINTS (IF APPLICABLE):
N/A

20. LIST OF PARTICIPATING DEALERS (IF APPLICABLE):
N/A

21. PREVENTIVE MAINTENANCE (IF APPLICABLE):
N/A

22a. SPECIAL ATTRIBUTES SUCH AS ENVIRONMENTAL ATTRIBUTES
N/A

22b. SECTION 508 COMPLIANCE FOR EIT:
N/A The EIT Standards can be found at: www.section508.gov/

23. Unique Entity Identifier (UEI):
UEI: P4NPJQY8B4N7 DUNS: 075123133

24. NOTIFICATION REGARDING REGISTRATION IN SYSTEM FOR AWARD MANAGEMENT(SAM) DATABASE:
Contractor has an Active Registration in the SAM database.