



General Services Administration
Federal Supply Service
Financial and Business Solutions (FABS)
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 are available through GSA Advantage!TM, a menu-driven database system. The INTERNET address GSA Advantage!TM is: <http://www.GSAAdvantage.gov>

FSC Group:	520
Contract Number:	GS-23F-0019X
Contract Period:	Dec. 2010 – Dec. 2015
Contractor's Name:	Bolton Partners, Inc.
Contractor's Address:	100 Light Street, 9 th Floor Baltimore, MD 21202
Contractor's Phone Number:	(410) 547-0500
Contractor's Fax Number:	(410) 685-1924
Contractor's Website:	www.BoltonPartners.com
Contact for Administration:	Agatha Arlington
E-Mail:	AArlington@boltonpartners.com
Business Size:	Large



U.S. General Services Administration

Bolton Partners, Inc.

100 Light Street • 9th Floor • Baltimore, Maryland 21202 • (410) 547-0500 • (800) 394-0263 • Fax (410) 685-1924
Actuarial, Benefit and Investment Consultants



Table of Contents

ORDERING INFORMATION..... 3

BOLTON PARTNERS, INC’S LABOR CATEGAORY DESCRIPTIONS 5

BOLTON PARTNERS, INC’S LABOR CATEGORY RATES12

ORDERING INFORMATION

- 1a. **Services Provided Under Award Specialty Item Number (SIN):** 11520-13 Complementary Financial Management Services
- 1b. **Rates for Financial Management Services:** See page 12 for rates
- 1 c. **Description of all commercial job titles, experience, functional responsibility, and education for those types of employees or subcontractors who will perform services:** See page 5 for the labor category descriptions
2. **Maximum order:** \$1,000,000
3. **Minimum order:** \$5,000
4. **Geographic coverage:** Domestic Delivery Only
5. **Point(s) of production:** Baltimore, MD
6. **Discount from list prices or statement of net price:** Government prices are net
7. **Quantity discounts:** Not Applicable
8. **Prompt payment terms:** Net 30 days
- 9a. **Government purchase cards:** Accepted up to the micro-purchase threshold
- 9b. **Government purchase cards:** Accepted above the micro-purchase threshold
10. **Foreign items:** Not Applicable
- 11a. **Time of delivery:** To be negotiated with ordering agency
- 11b. **Expedited Delivery:** To be negotiated with ordering agency
- 11c. **Overnight and 2-day delivery:** Yes
- 11d. **Urgent Requirements:** See Contract Clause I-FSS-14-B. Agencies can contact the Contractor's representative to obtain a faster delivery.
12. **F.O.B. point(s):** Destination
13. **Ordering address(es):**
Bolton Partners, Inc
100 Light Street, 9th Floor
Baltimore, MD 21202

14. **Payment address(es):**
Bolton Partners, Inc
100 Light Street, 9th Floor
Baltimore, MD 21202
15. **Warranty provision:** Not Applicable
16. **Export packing charges:** Not Applicable
17. **Terms and conditions of Government purchase card acceptance above the micro-purchase level:** Not Applicable
18. **Terms and conditions of rental, maintenance, and repair:** Not Applicable
19. **Terms and conditions of installation:** Not Applicable
20. **Terms and conditions of repairs:** Not Applicable
- 20a. **Terms and conditions for any other services:** Not Applicable
21. **List of service and distribution points:** Not Applicable
22. **List of participating dealers:** Not Applicable
23. **Preventive maintenance:** Not Applicable
24. **Environmental attributes:** None
25. **Data Universal Number System (DUNS) number:** 62-614-2616
26. **Registration in Central Contractor Registration (CCR) database:** Registered and valid until 01/26/2012

BOLTON PARTNERS, INC'S LABOR CATEGORY DESCRIPTIONS

General

Partner/Executive Director

Description: Responsible for scope, direction, planning and completion, as well as the commitment of the Firm's resources to the engagement plan. Monitors the status of the engagement. Is also responsible for overall project management and the presentation of final work product.

Experience & Education: Minimum BA or BS degree. At least 15 years experience in the benefits consulting field, and a minimum of 5 years experience at a senior management level.

Administrative Assistant

Description: Possess demonstrated knowledge, experience, and ability to perform complex administrative duties with minimum supervision including:

- RFP search and proposal preparation
- Processing benefit calculations
- Packaging and mailing Government Forms packages
- Processing participant benefit statements
- Coordinating client meetings
- Preparing meeting materials
- Preparing Annual Reports
- Preparing correspondence
- Conducting research and appropriations when necessary
- Coordinating company mailings
- Filing

Experience & Education: 3 years related experience (includes RFP preparation, technical exhibits, and production of monitoring reports).

Retirement Plan Services

Senior Actuary

Description: Specializes in the design, valuation and consulting for defined benefit, defined contribution and retiree medical plans including.:

- Contribution and expense amounts for both qualified and nonqualified plans
- Plan design for both permanent and window benefit features
- Communication of benefit issues with clients
- Actuarial experience studies
- Asset allocation and spin-offs
- QDRO calculations
- DROP (Deferred Retirement Option Plan) programs
- Applicable IRS rules
- Funding policies
- Supervising pension plan valuations
- Presentation of annual valuation and experience analysis results to trustees
- Studying plan changes to help jurisdictions provide appropriate benefits for employees while working within budgetary constraints

Evaluates options in the context of project objectives and contributes to the implementation of strategic direction. Direct reports are actuaries.

Experience & Education: Minimum BA or BS degree. Enrolled Actuary by the Joint Board for Enrollment, Associate of the Society of Actuaries, Fellow of the Society of Actuaries, at least 15 years of significant actuarial experience (includes plan valuation, setting actuarial assumptions, analysis of plan experience, plan design, strategic planning, and benefit program software).

Actuary

Description: Supports project objectives through activities such as the valuation, funding and accounting analysis of defined benefit and defined contribution retirement plans including:

- Contribution and expense amounts for both qualified and nonqualified plans
- Long term projections for funding and expense purposes
- Accounting settlements for curtailments
- Programming GASB 45 valuations
- Calculation of benefits for plan participants
- Review and update data for valuations
- Review reasonableness of actuarial assumptions
- Non-discrimination testing
- Actuarial experience studies
- Communication of benefit issues with clients

Direct reports are associate actuaries and actuarial analysts.

Experience & Education: Minimum BA or BS degree. Enrolled Actuary by the Joint Board for Enrollment, Associate of the Society of Actuaries, Fellow of the Society of Actuaries, at least 10 years of significant actuarial experience (includes plan valuation, setting actuarial assumptions, analysis of plan experience, plan design, strategic planning, and benefit program software).

Associate Actuary

Description: Supports project objectives through activities such as:

- Pension plan contribution determination
- Plan termination liability
- Calculation of benefits for plan participants
- Plan design and optimization
- Non-discrimination testing
- Programming GASB 45 valuations
- Review and update data for valuations
- Benefit calculation certification and review
- Preparing benefit statements
- Communication of benefit issues with clients

Experience & Education: Minimum BA or BS degree. Enrolled Actuary by the Joint Board for Enrollment, Associate of the Society of Actuaries, Fellow of the Society of Actuaries, at least 5 years of significant actuarial experience (includes plan valuation, setting actuarial assumptions, analysis of plan experience, plan design, strategic planning, and benefit program software).

Actuarial Assistant 1

Description: Supports project objectives through activities such as:

- Preparation of actuarial valuations for single-employer, multi-employer and public sector retirement plans
- Programming GASB 45 valuations
- Calculation of benefits for plan participants
- Review and update data for valuations
- Annual review of asset data
- Preparation of IRS Form 5500, PBGC Form 1, and Summary Annual Report
- Communication of benefit issues with clients

Experience & Education: BA or BS degree with at least 3 years of Actuarial Assistant experience.

Actuarial Assistant 2

Description: Supports project objectives through activities such as:

- Preparation of actuarial valuations for single-employer, multi-employer and public sector retirement plans
- Programming GASB 45 valuations
- Calculation of benefits for plan participants
- Review and update data for valuations
- Annual review of asset data
- Preparation of IRS Form 5500, PBGC Form 1, and Summary Annual Report
- Communication of benefit issues with clients

Experience & Education: BA or BS degree with concentration in math or computer science. One year of related experience.

Health & Welfare Services

Senior Consultant

Description: Specializes in the consultation for pricing, design and implementation of employee benefit plans including:

- Evaluation of insurance carrier proposals, including underwriting policies and funding arrangements.
- ERISA, COBRA, HIPAA compliance and welfare non-discrimination testing.
- Consumer focused solutions including HRAs, HSAs, and FSAs.
- Medicare Part D – Prescription Drug benefit evaluation
- Cost projections and risk evaluation of all types of health care products.
- Vendor contract analysis and negotiations
- Design and actuarial pricing of flexible benefit medical plan options.
- Cost projections and formulation of long-term funding strategies for large multi-employer medical plans.
- Evaluation and analysis of managed care products and provider arrangements.
- Analysis and evaluation of Pharmacy Benefit Manager pricing and programs
- Analysis of comprehensive wellness and care management programs; development of strategies for client implementation
- Evaluation of plan liabilities for financial disclosure, including Incurred but Not Reported liability, rate stabilization reserve requirements, and extended eligibility liabilities
- Analysis of retiree liabilities in connection with FAS 106, GASB 45 and SOP 92-6 valuations.
- Comprehensive knowledge of all applicable insurance and benefit regulations
- Analysis of life and disability insurance plans including alternate funding arrangements
- Development of open enrollment plans for large group projects
- Preparation and evaluation of RFPs including Health, Prescription Drug, Dental, Vision, Flexible Spending Account administration and Life Insurance
- Client management skills including presentations to governing boards and senior management

Experience & Education: Bachelor's degree and CEBS designation plus 15 years of experience (includes strategic planning, plan design, senior level presentation, project supervision, budget preparation, regulatory issues).

Consultant and Senior Technical

Description: Supports project objectives through activities such as:

- Design and implementation of flexible benefit plans
- Preparation of communication programs necessary to educate and enroll employees in welfare benefit programs
- Evaluation of insurance carrier proposals, including underwriting policies and funding arrangements
- Consumer focused solutions including HRAs, HSAs, and FSAs
- ERISA, COBRA and HIPAA compliance and welfare non-discrimination testing.
- Comprehensive knowledge of all applicable insurance and benefit regulations

- Analysis of life and disability insurance plans including alternate funding arrangements
- Medicare Part D – Prescription Drug benefit administration and client support
- Cost projections for large multi-employer medical plans
- Analysis of comprehensive wellness and care management programs
- Analysis and evaluation of Pharmacy Benefit Manager pricing and programs
- Cost projections and risk evaluation of all types of health care products
- Implementation of online employee enrollment and eligibility maintenance systems
- Development of communication materials to support plan compliance with regulatory required notifications
- Evaluation and analysis of managed care products and provider arrangements
- Development of open enrollment plans for large group projects
- Vendor contract analysis and negotiations
- Preparation and evaluation of RFPs including Health, Prescription Drug, Dental, Vision, Flexible Spending Account administration and Life Insurance
- Client interaction skills

Experience & Education: Bachelor's degree plus 10 years of experience (includes plan design, underwriting principles and practices, insurance carrier regulations, experience and reserve evaluation).

Consultant

Description: Responsible for assisting with Health & Welfare benefit design, customer service, data collection, research of technical issues and complicated spreadsheet comparisons and graphical displays. Specializes in group dental, health and disability programs as well as documenting welfare program design provisions in plan documents. Also responsible for the annual reports for Health & Welfare plans and Medicare Part D technical analysis.

Experience & Education: Bachelor's degree plus 5 years of experience (includes plan design, underwriting techniques, experience reviews, cost projection).

Technical Associate

Description: Responsible for assisting with Health & Welfare benefit design, customer service, data collection, and research of technical issues. Specializes in group dental, health and disability programs as well as documenting welfare program design provisions in plan documents.

Experience & Education: Bachelor's degree plus 3 years of experience (includes RFP preparation, bid review, technical exhibits).

Investment Consulting Services

Senior Consultant

Description: Specializes in investment consulting solutions for defined benefit and defined contribution plans, OPEB Trusts and VEBAs including:

- Retirement Plan Performance Monitoring Reports
- Asset Allocation Strategies
- Fiduciary Education
- Plan Reviews
- Fee Analysis & Negotiation
- Peer Surveys & Benchmarking
- Plan Design & Implementation

Also responsible for evaluating options in the context of project objectives and contributes to the implementation of strategic direction. Direct reports are consultants and financial analysts.

Experience & Education: Advanced degree and/or CFA Charterholder plus 10 years of relevant experience dealing with the investment decision-making process (includes supporting consultant with asset/liability modeling, manager search, selection and monitoring and qualitative analysis).

Consultant

Description: Supports project objectives through activities such as:

- Retirement Plan Performance Monitoring Reports
- Investment Line-up Reviews
- Investment Policy Statements
- Asset Allocation Strategies
- Investment Manager Searches.

Experience & Education: Advanced degree and/or CFA Charterholder plus 6 years of relevant experience dealing with the investment decision-making process (includes client management, asset/liability modeling and manager search, selection and monitoring and qualitative analysis).

Financial Analyst

Description: Supports project objectives through activities such as:

- Retirement Plan Performance Monitoring Reports
- Vendor Searches for 403(b), 457(b), & 401(k) Plans
- Investment Line-up Reviews
- Investment Manager Searches.

Experience & Education: Bachelor's degree plus 1 year of relevant experience dealing with the investment decision-making process.

BOLTON PARTNERS, INC'S LABOR CATEGORY RATES

Labor Category	GSA Price for December 15, 2010 - December 14, 2011	GSA Price for December 15, 2011 - December 14, 2012	GSA Price for December 15, 2012 - December 14, 2013	GSA Price for December 15, 2013 - December 14, 2014	GSA Price for December 15, 2014 - December 14, 2015
Partner/Executive Director	\$439.80	\$448.60	\$457.57	\$466.72	\$476.05
Senior Actuary	\$390.93	\$398.75	\$406.73	\$414.86	\$423.16
Actuary	\$342.07	\$348.91	\$355.89	\$363.01	\$370.27
Associate Actuary	\$283.43	\$289.10	\$294.88	\$300.78	\$306.80
Actuary Assistant 1	\$234.56	\$239.25	\$244.04	\$248.92	\$253.90
Actuary Assistant 2	\$151.49	\$154.52	\$157.61	\$160.76	\$163.98
Health & Welfare Sr. Consultant	\$366.50	\$373.83	\$381.31	\$388.94	\$396.72
Health & Welfare Consultant & Sr. Technical	\$307.86	\$314.02	\$320.30	\$326.71	\$333.24
Health & Welfare Consultant	\$239.45	\$244.24	\$249.12	\$254.10	\$259.18
Health & Welfare Technical Associate	\$175.92	\$179.44	\$183.03	\$186.69	\$190.42
Investments - Senior Consultant	\$342.07	\$348.91	\$355.89	\$363.01	\$370.27
Investments - Consultant	\$244.33	\$249.22	\$254.20	\$259.28	\$264.47
Investments - Financial Analyst	\$122.17	\$124.61	\$127.10	\$129.64	\$132.23
Administrative Assistant	\$117.28	\$119.63	\$122.02	\$124.46	\$126.95

Labor Category	GSA Price for December 15, 2015 - December 14, 2016	GSA Price for December 15, 2016 - December 14, 2017	GSA Price for December 15, 2017 - December 14, 2018	GSA Price for December 15, 2018 - December 14, 2019	GSA Price for December 15, 2019 - December 14, 2020
Partner/Executive Director	\$485.57	\$495.28	\$505.19	\$515.29	\$525.60
Senior Actuary	\$431.62	\$440.25	\$449.06	\$458.04	\$467.20
Actuary	\$377.67	\$385.22	\$392.92	\$400.78	\$408.80
Associate Actuary	\$312.92	\$319.18	\$325.56	\$332.07	\$338.71
Actuary Assistant 1	\$258.97	\$264.15	\$269.43	\$274.82	\$280.32
Actuary Assistant 2	\$167.25	\$170.60	\$174.01	\$177.49	\$181.04
Health & Welfare Sr. Consultant	\$404.64	\$412.73	\$420.98	\$429.40	\$437.99
Health & Welfare Consultant & Sr. Technical	\$339.90	\$346.70	\$353.63	\$360.70	\$367.91
Health & Welfare Consultant	\$264.37	\$269.66	\$275.05	\$280.55	\$286.16
Health & Welfare Technical Associate	\$194.23	\$198.11	\$202.07	\$206.11	\$210.23
Investments - Senior Consultant	\$377.67	\$385.22	\$392.92	\$400.78	\$408.80
Investments - Consultant	\$269.76	\$275.16	\$280.66	\$286.27	\$292.00
Investments - Financial Analyst	\$134.88	\$137.58	\$140.33	\$143.14	\$146.00
Administrative Assistant	\$129.49	\$132.08	\$134.72	\$137.41	\$140.16

Labor Category	GSA Price for December 15, 2020 - December 14, 2021	GSA Price for December 15, 2021 - December 14, 2022	GSA Price for December 15, 2022 - December 14, 2023	GSA Price for December 15, 2023 - December 14, 2024	GSA Price for December 15, 2024 - December 14, 2025
Partner/Executive Director	\$536.11	\$546.83	\$557.77	\$568.93	\$580.31
Senior Actuary	\$476.54	\$486.07	\$495.79	\$505.71	\$515.82
Actuary	\$416.98	\$425.32	\$433.83	\$442.51	\$451.36
Associate Actuary	\$345.49	\$352.40	\$359.45	\$366.64	\$373.97
Actuary Assistant 1	\$285.93	\$291.65	\$297.48	\$303.43	\$309.50
Actuary Assistant 2	\$184.66	\$188.35	\$192.12	\$195.96	\$199.88
Health & Welfare Sr. Consultant	\$446.76	\$455.70	\$464.81	\$474.11	\$483.59
Health & Welfare Consultant & Sr. Technical	\$375.28	\$382.79	\$390.45	\$398.26	\$406.23
Health & Welfare Consultant	\$291.88	\$297.72	\$303.67	\$309.74	\$315.93
Health & Welfare Technical Associate	\$214.44	\$218.73	\$223.10	\$227.56	\$232.11
Investments - Senior Consultant	\$416.98	\$425.32	\$433.83	\$442.51	\$451.36
Investments - Consultant	\$297.84	\$303.80	\$309.88	\$316.08	\$322.40
Investments - Financial Analyst	\$148.92	\$151.90	\$154.94	\$158.04	\$161.20
Administrative Assistant	\$142.96	\$145.82	\$148.74	\$151.71	\$154.74

Labor Category	GSA Price for December 15, 2025 - December 14, 2026	GSA Price for December 15, 2026 - December 14, 2027	GSA Price for December 15, 2027 - December 14, 2028	GSA Price for December 15, 2028 - December 14, 2029	GSA Price for December 15, 2029 - December 14, 2030
Partner/Executive Director	\$591.91	\$603.75	\$615.83	\$628.15	\$640.71
Senior Actuary	\$526.14	\$536.66	\$547.39	\$558.34	\$569.51
Actuary	\$460.38	\$469.59	\$478.98	\$488.56	\$498.33
Associate Actuary	\$381.45	\$389.08	\$396.86	\$404.80	\$412.90
Actuary Assistant 1	\$315.69	\$322.00	\$328.44	\$335.01	\$341.71
Actuary Assistant 2	\$203.88	\$207.96	\$212.12	\$216.36	\$220.69
Health & Welfare Sr. Consultant	\$493.26	\$503.13	\$513.19	\$523.45	\$533.92
Health & Welfare Consultant & Sr. Technical	\$414.34	\$422.63	\$431.08	\$439.70	\$448.49
Health & Welfare Consultant	\$322.26	\$328.71	\$335.28	\$341.99	\$348.83
Health & Welfare Technical Associate	\$236.76	\$241.50	\$246.33	\$251.26	\$256.29
Investments - Senior Consultant	\$460.38	\$469.59	\$478.98	\$488.56	\$498.33
Investments - Consultant	\$328.84	\$335.42	\$342.13	\$348.97	\$355.95
Investments - Financial Analyst	\$164.42	\$167.71	\$171.06	\$174.48	\$177.97
Administrative Assistant	\$157.84	\$161.00	\$164.22	\$167.50	\$170.85