

**LOPEZ & ASSOCIATES, LLP**

**dba**

**Lopez and Company, LLP.**

**WORLDWIDE**

**FEDERAL SUPPLY SCHEDULE CONTRACT FOR**

**FINANCIAL AND BUSINESS SOLUTIONS**

**APPLICATION FOR SOLICITATION No. FCXB-F4-020002-B**

**STANDING SOLICITATION**

**FSC GROUP 520**

**MULTIPLE AWARD SCHEDULE (MAS) NO. 520**

**NAICS: 541211**

**CONTRACT PERIOD: Five Years from Date of Award, with Three (3) Five-Year Option Periods.**

**SCHEDULE PERIOD: The schedule period is continuously open.**

Offeror's Name (include a Doing Business As (DBA) if applicable):

**Lopez & Associates, LLP, dba Lopez and Company, LLP**

Offeror's Address:

**3452 E. Foothill Blvd., Suite 820  
Pasadena, California 91107**

Business Size/Designation (check one):

- 8(a)  Small Business
- Small Disadvantaged Small Business  HUBZone Small Business
- Women-Owned Small Business  Veteran-Owned Small Business
- Service Disabled Veteran Owned Small Business  Large Business
- Woman Owned Large Business

**DUNS Number: 809621832**

Each Authorized Negotiator's Name, Title, Phone and Fax Numbers, and E-mail Address:

**Richard M. Lopez, Managing Partner (626) 583-1116 – Office, (626) 577-8439 – Fax, [rlopez@lopezllp.com](mailto:rlopez@lopezllp.com) – Email**

**Elizabeth A. Lopez, Partner (626) 583-1116 – Office, (626) 577-8439 – Fax, [elopez@lopezllp.com](mailto:elopez@lopezllp.com) – Email**

Special Item Number(s) (SINs) Offering (check all that apply):

- |           |                          |            |                                     |            |                          |
|-----------|--------------------------|------------|-------------------------------------|------------|--------------------------|
| SIN 520-1 | <input type="checkbox"/> | SIN 520-7  | <input checked="" type="checkbox"/> | SIN 520-13 | <input type="checkbox"/> |
| SIN 520-2 | <input type="checkbox"/> | SIN 520-8  | <input type="checkbox"/>            | SIN 520-14 | <input type="checkbox"/> |
| SIN 520-3 | <input type="checkbox"/> | SIN 520-9  | <input type="checkbox"/>            | SIN 520-15 | <input type="checkbox"/> |
| SIN 520-4 | <input type="checkbox"/> | SIN 520-10 | <input type="checkbox"/>            | SIN 520-16 | <input type="checkbox"/> |
| SIN 520-5 | <input type="checkbox"/> | SIN 520-11 | <input type="checkbox"/>            | SIN 520-99 | <input type="checkbox"/> |
| SIN 520-6 | <input type="checkbox"/> | SIN 520-12 | <input type="checkbox"/>            |            |                          |

I, Richard M. Lopez, represent, to the best of my knowledge and belief, that the information included in my offer is complete, accurate, and true.

\_\_\_\_\_  
Signature

**Richard M. Lopez**  
Printed Name

**April 22, 2005**  
Date

**Managing Partner**  
Title

<b>SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS</b> <i>OFFEROR TO COMPLETE BLOCKS 17 &amp; 30</i>				1. REQUISITION NO.	PAGE 1 OF
2. CONTRACT NO. GS-23F-0020S	3. AWARD/EFFECTIVE DATE 11/07/05	4. ORDER NO. N/A	5. SOLICITATION NUMBER FCXB-F4-020002-B (Refresh 2)	6. SOLICITATION ISSUE DATE 7/18/05	
<b>7. FOR SOLICITATION INFORMATION CALL</b>			a. NAME Teresa A. Fox	b. TELEPHONE NO. <i>(No collect calls)</i> 703.605.2758	8. OFFER DUE DATE/LOCAL TIME N/A
9. ISSUED BY GSA/FSS/FCXB 1901 South Bell St., Room 503 Arlington, VA 22202		CODE	10. THIS ACQUISITION IS <input checked="" type="checkbox"/> UNRESTRICTED NAICS 541221 7 million  <input type="checkbox"/> SMALL DISADV. BUSINESS <input type="checkbox"/> 8(A)  SIC: SEE Pages 14 & 15 SIZE STD:		11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED SEE SCHEDULE
SUBMIT OFFERS TO: GSA, FSS, FCXB  1901 South Bell St., Rm 503  Arlington, VA 22202			12. DISCOUNT TERMS .5%-15 days (1/2 percent if paid in 15 days)		13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700)
15. DELIVER TO  To be shown on each order issued under Any contract resulting from solicitation		CODE	16. ADMINISTERED BY SEE BLOCK 9		13b. RATING
17a. CONTRACTOR/OFFEROR Lopez and Associates, LLP DBA Lopez and Company, LLP 3452 E. Foothill Blvd. Ste#820 Pasadena, CA 91107 TELEPHONE NO. (626) 583-1116		CODE	18a. PAYMENT WILL BE MADE BY To be shown on all orders issued under this contract		14. METHOD OF SOLICITATION <input type="checkbox"/> RFQ <input type="checkbox"/> IFB <input checked="" type="checkbox"/> RFP
<input type="checkbox"/> 17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER			18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM		
19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES	21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT
	FINANCIAL AND BUSINESS SOLUTIONS Schedule 520 541211 (NAICS)				
25. ACCOUNTING AND APPROPRIATION DATA				26. TOTAL AWARD AMOUNT <i>(For Govt. Use Only)</i>	
27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1, 52.212-4. FAR 52.212-3 AND 52.212-5 ARE ATTACHED. ADDENDA <input type="checkbox"/> ARE ARE NOT ATTACHED.					
X 27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4. FAR 52.212-5 IS ATTACHED. ADDENDA X ARE <input type="checkbox"/> ARE NOT ATTACHED.					
28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN <u>2</u> COPIES TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED HEREIN. <input checked="" type="checkbox"/>			29. AWARD OF CONTRACT: REFERENCE <u>Lopez and Assoc.</u> OFFER DATED _____ YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS: <input checked="" type="checkbox"/>		
30a. SIGNATURE OF OFFEROR/CONTRACTOR			31a. UNITED STATES OF AMERICA <i>(SIGNATURE OF CONTRACTING OFFICER)</i>		
30b. NAME AND TITLE OF SIGNER <i>(TYPE OR PRINT)</i> Richard M. Lopez, Partner		30c. DATE SIGNED 11/07/05	31b. NAME OF CONTRACTING OFFICER <i>(TYPE OR PRINT)</i>		31c. DATE SIGNED
32a. QUANTITY IN COLUMN 21 HAS BEEN  <input type="checkbox"/> RECEIVED <input type="checkbox"/> INSPECTED <input type="checkbox"/> ACCEPTED, AND CONFORMS TO THE CONTRACT, EXCEPT AS NOTED			33. SHIP NUMBER  <input type="checkbox"/> PARTIAL	34. VOUCHER NUMBER	35. AMOUNT VERIFIED CORRECT FOR
32b. SIGNATURE OF AUTHORIZED GOVT REPRESENTATIVE		32c. DATE	36. PAYMENT <input type="checkbox"/> COMPLETE <input type="checkbox"/> PARTIAL <input type="checkbox"/>		37. CHECK NUMBER
41a. I CERTIFY THIS ACCOUNT IS CORRECT AND PROPER FOR PAYMENT			38. S/R ACCOUNT NO.		39. S/R VOUCHER NO.
41b. SIGNATURE AND TITLE OF CERTIFYING OFFICER		41c. DATE	42a. RECEIVED BY <i>(Print)</i>		40. PAID BY
			42b. RECEIVED AT <i>(Location)</i>		
			42c. DATE REC'D <i>(YY/MM/DD)</i>	42d. TOTAL CONTAINERS	

**PRICING PROPOSAL**

1. SPECIAL ITEM NUMBERS AWARDED: 520-7, Financial and Performance Audits
2. AWARDED PRICES: See below, item 11
3. PROMPT PAYMENT DISCOUNT: ½% if paid within 15 days
4. FOB: Destination
5. MINIMUM ORDER LIMITATION: \$300
6. MAXIMUM ORDER: \$1,000,000
7. CONTRACT PERIOD: November 7, 2005, to November 6, 2010, with 3 five year options
8. Task orders are firm fixed price preferred but Labor Hours and task Time and Materials orders are acceptable.
9. Lopez and Associates, LLP agrees to remit 0.75% Industrial Funding Fee for sales under this contract as instructed in clause 552.238-74 (JUL 2003)
10. The following documents are hereby incorporated into the contract:
  - a) Amendment 1 as submitted by Lopez and Associates on 10/26/05
  - b) Labor Category Descriptions as submitted by Lopez and Associates on 8/16/05

The following hourly rates are awarded:

	11/7/2005	11/7/2006	11/7/2007	11/7/2008	11/7/2009
	-	-	-	-	-
Labor Category	11/6/2006	11/6/2007	11/6/2008	11/6/2009	11/6/2010

Senior Partner	\$188.40	\$194.99	\$201.82	\$208.88	\$216.19
Senior Consulting Analyst	\$188.40	\$194.99	\$201.82	\$208.88	\$216.19
Partner	\$166.24	\$172.06	\$178.08	\$184.31	\$190.76
Senior Manager	\$141.05	\$145.99	\$151.10	\$156.38	\$161.86
Project Director	\$141.05	\$145.99	\$151.10	\$156.38	\$161.86
Manager	\$101.76	\$105.32	\$109.01	\$112.82	\$116.77
Supervisory Auditor	\$88.74	\$91.85	\$95.06	\$98.39	\$101.83
Senior Auditor	\$78.59	\$81.34	\$84.19	\$87.13	\$90.18
Network Administrator	\$62.47	\$64.66	\$66.92	\$69.26	\$71.69
Staff Accountant / Auditor	\$64.48	\$66.74	\$69.07	\$71.49	\$73.99
Associate Accountant / Auditor	\$50.38	\$52.14	\$53.97	\$55.86	\$57.81
Project Administrator	\$80.60	\$83.42	\$86.34	\$89.36	\$92.49
Administrative	\$42.32	\$43.80	\$45.33	\$46.92	\$48.56

An annual escalation rate of 3.5% is in effect for the base and option periods, and shall be applied on the anniversary date of award.

12. Price Reductions: For purposes of the price reductions clause (552.238-75) award is based on the following commercial customers:

Labor Category	Customer
Senior Partner	Pasadena Blue Line
Senior Consulting Analyst	Pasadena Blue Line
Partner	Los Angeles Metropolitan Transportation Authority
Senior Manager	Pasadena Blue Line
Project Director	Pasadena Blue Line
Manager	Los Angeles Metropolitan Transportation Authority
Supervisory Auditor	Los Angeles Metropolitan Transportation Authority
Senior Auditor	Los Angeles Metropolitan Transportation Authority
Network Administrator	L Tech Network Services
Staff Accountant / Auditor	Grant Thornton
Associate Accountant / Auditor	Los Angeles Metropolitan Transportation Authority
Project Administrator	Pasadena Blue Line
Administrative	Far West Meats

Throughout the life of the contract, the Government shall receive rates equal to or better than those extended to these customers.