



**GENERAL SERVICES ADMINISTRATION
FEDERAL ACQUISITION 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 are available through GSA Advantage!, a menu-driven database system. The Internet address for GSA Advantage! is:

<http://www.gsaadvantage.gov>

**General Services Administration
Federal Supply Service
Professional Services Schedule (PSS)
Industrial Group - 00CORP**

CONTRACT NUMBER:

GS-23F-0081X

PERIOD COVERED BY CONTRACT:

May 26, 2011 THROUGH May 25, 2021

**Examination Resources, LLC
3475 Piedmont Road NE, Suite 410
Atlanta, GA 30305
(P) 404-816-6188
(F) 404-816-6197**

General Services Administration
Management Services Center Acquisition Division
Option # 1, Option Period May 26, 2016 – May 25, 2021
Supplement # PS-0013, dated June 23, 2016

Business Size: SMALL, WOMAN OWNED

DUNS: 023680558

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

GSA AWARDED TERMS AND CONDITIONS

Examination Resources, LLC

- 1a. Table of awarded special item number(s) with appropriate cross-reference to item descriptions and awarded prices.

SIN 520-8/RC – COMPLEMENTARY AUDIT SERVICES/RC
SIN 520-11/RC – ACCOUNTING/RC
SIN 520-13/RC – COMPLEMENTARY FINANCIAL MANAGEMENT SERVICES/RC
SIN 520-17/RC – RISK ASSESSMENT AND MITIGATION SERVICES/RC

- 1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract.

See Pricing Below

- 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.

See Pricing Below

2. MAXIMUM ORDER:

SIN 520-8 – \$1,000,000
SIN 520-11 – \$1,000,000
SIN 520-13 – \$1,000,000
SIN 520-17 – \$1,000,000

3. MINIMUM ORDER:

\$100.00

4. GEOGRAPHIC COVERAGE (DELIVERY AREA):

48 Contiguous States and the District of Columbia.

5. Point(s) of production (city, county, and State or foreign country).

3475 Piedmont Road NE, Suite 410
Atlanta, GA 30305
(P) 404-816-6188

6. Discount from list prices or statement of net price.

GSA Net pricing shown in pricing tables provided – See ATTACHMENT A

7. QUANTITY DISCOUNTS.
\$300,000 - \$499,999 = 4%
\$500,000 - \$749,999 = 5%
\$750,000 - \$999,999 = 6%
8. PROMPT PAYMENT TERMS:
0%, Net 30 Days
- 9a. Government purchase cards **are accepted** at or below the micro-purchase threshold.
- 9b. Government purchase cards **are not accepted** above the micro-purchase threshold.
10. FOREIGN ITEMS (LIST ITEMS BY COUNTRY OF ORIGIN):
None
- 11a. TIME OF DELIVERY:
Specified on task order
- 11b. EXPEDITED DELIVERY:
Please contact contractor for expedited delivery
- 11c. OVERNIGHT AND 2-DAY DELIVERY:
Please contact contractor for overnight and 2- day delivery
- 11d. URGENT REQUIREMENTS:
Please contact contractor for urgent requirements
12. F.O.B. POINT(S):
Destination
- 13a. ORDERING ADDRESS:
3475 Piedmont Road NE, Suite 410
Atlanta, GA 30305
(P) 404-816-6188
- 13b. Ordering procedures: For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA s), and a sample BPA can be found at the GSA/FSS Schedule homepage fss.gsa.gov/schedules.

14. PAYMENT ADDRESS.
**3475 Piedmont Road NE, Suite 410
Atlanta, GA 30305
(P) 404-816-6188**
15. WARRANTY PROVISION.
Not Applicable
16. EXPORT PACKING CHARGES, IF APPLICABLE.
Not Applicable
17. TERMS AND CONDITIONS OF GOVERNMENT PURCHASE CARD ACCEPTANCE (ANY THRESHOLDS ABOVE THE MICRO-PURCHASE LEVEL).
Not accepted above the micro-purchase threshold
18. TERMS AND CONDITIONS OF RENTAL, MAINTENANCE, AND REPAIR (IF APPLICABLE).
Not Applicable
19. TERMS AND CONDITIONS OF INSTALLATION (IF APPLICABLE).
Not Applicable
- 20a. TERMS AND CONDITIONS OF REPAIR PARTS INDICATING DATE OF PARTS PRICE LISTS AND ANY DISCOUNTS FROM LIST PRICES (IF APPLICABLE).
Not Applicable
- 20b. TERMS AND CONDITIONS FOR ANY OTHER SERVICES (IF APPLICABLE)
Not Applicable
21. LIST OF SERVICE AND DISTRIBUTION POINTS (IF APPLICABLE).
Not Applicable
22. LIST OF PARTICIPATING DEALERS (IF APPLICABLE).
Not Applicable
23. PREVENTIVE MAINTENANCE (IF APPLICABLE).
Not Applicable

- 24a. Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants).
- Not Applicable**
- 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/.
25. DATA UNIVERSAL NUMBER SYSTEM (DUNS) NUMBER.
- 023680558**
26. Notification regarding registration in System for Award Management (SAM).
- Registered - CAGE CODE # 65RJ3**
27. Point of Contact: Rebecca Belanger-Walkins
rebeccawalkins@examresources.net
404-816-6188
28. The Service Contract Act (SCA) is not applicable to this contract as it applies to the entire OOCORP Professional Services Schedule and all services provided. While no specific labor categories have been identified as being subject to SCA due to exemptions for professional employees (FAR 22.101, 22.1102 and 29 CFR 541.300, this contract still maintains the provisions and protections for SCA eligible labor categories. If and/or when the contractor adds SCA labor categories/employees to the contract through the modification process, the contractor must inform the Contracting office and establish a SCA matrix identifying the GSA labor category titles, the occupational code, SCA labor category titles and the applicable WD number. Failure to do so may result in cancellation of the contract.

ATTACHMENT A
Awarded GSA Rates
Examination Resources, LLC

SIN	JOB TITLE	MINIMUM EDUCATIONAL REQUIREMENTS	MINIMUM YEARS OF EXPERIENCE	UNIT OF ISSUE	GSA Price w/IFF
Examination Services					
520-8, 520-11, 520-13, 520-17	Member/Manager	BS	10	Hour	\$ 127.05
520-8, 520-11, 520-13, 520-17	Supervisor	BS	6	Hour	\$ 127.05
520-8, 520-11, 520-13, 520-17	Examiner-in-Charge	BS	5	Hour	\$ 127.05
520-8, 520-11, 520-13, 520-17	Senior Examiner	BS	4	Hour	\$ 122.17
520-8, 520-11, 520-13, 520-17	Examiner	BS	2	Hour	\$ 117.28
520-8, 520-11, 520-13, 520-17	Junior Examiner	BS	0	Hour	\$ 97.73
Actuarial Services					
520-13	Managing Actuary, Life & Health	BS	8	Hour	\$ 210.13
520-13	Managing Actuary, Property & Casualty	BS	8	Hour	\$ 210.13
520-13	Actuary, Life & Health	BS	6	Hour	\$ 190.58
520-13	Actuary, Property & Casualty	BS	6	Hour	\$ 190.58
520-13	Actuarial Analyst	BS	2	Hour	\$ 171.03

	Specialized Services				
520-8, 520-11, 520-13, 520-17	Director	BS	8	Hour	\$ 195.47
520-8, 520-11, 520-13, 520-17	Supervisor	BS	8	Hour	\$ 171.03
520-8, 520-11, 520-13, 520-17	Information Systems/ (IT) Specialist	BS	8	Hour	\$ 131.94
520-8, 520-11, 520-13, 520-17	Reinsurance Specialist	BS	10	Hour	\$ 131.94
520-8, 520-11, 520-13, 520-17	Benefit Specialist	BS	10	Hour	\$ 122.17

* Pricing is for Domestic, Onsite and Offsite locations only

LABOR CATEGORY DESCRIPTIONS

EXAMINATION SERVICES

Position: *Member/Manager*

Functional Responsibility: Responsible for providing strategic direction, strategic vision, leadership and program management to the firm. Demonstrate leadership ability in a position of significant consulting or industry responsibility. Subject matter expert in a recognized discipline or specific expertise. Has regular involvement with the senior level leadership and team members. Maintains productive and effective client relationships with senior levels of client organization. Responsible for marketing, networking and business development. Client contact for more complex questions and information. Marshals resources across practice area to support client needs. Applies extensive technical skill consistently in complex situations. Overall responsibility for managing the delivery, quality and risk of each engagement.

Education/Experience: Bachelors Degree, with 10+ years of experience in management and/or functional area which they manage.

Position: *Supervisor/ Examination Supervisor*

Functional Responsibility: Supervise engagements in accordance with the audit procedures. Supervise/coordinate daily activities of the engagement team. May be involved in hiring selection of new employees. Responsible for new employee orientation with respect to policies, procedures, systems. Performs quality checks on output of designated systems and employees. Supervise, direct and review the results of various size projects and assignments. Involved in all stages of a project, using appropriate systems (such as audit and sampling software programs)

and/or advanced technical knowledge (such as GAAP/SAP). Supervises and trains those at lower levels. Client contact for basic questions and information. Documents, validates, tests and assesses various processes, systems, and/or programs. Maintain an engagement schedule, including IT, actuarial, specialists, etc.

Education/Experience: Bachelors Degree and 6+ years work experience in functional area supervised. Normally reports to Manager.

Position: *Examiner-in-Charge*

Functional Responsibility: Conduct examinations in accordance with the audit procedures developed regarding the financial condition and/or market conduct of companies and compliance with respective reporting requirements, laws, statutes and regulations. Act as the examiner-in-charge on financial and/or market conduct full scope/target examinations. Includes day-to-day “in-charge” responsibilities. Responsible for providing training and guidance to the participants of the team. Conduct detailed reviews of completed work papers of the team. Ensure that accurate, concise and complete detailed work papers support the examination procedures and to support all findings and/or errors pursuant to the instructions provided by government. Oversee the application of and utilize Audit Command Language (ACL) to analyze data and select samples. Correspond with clients, examinees, and all examination team members.

Education/Experience: Bachelors Degree and 5+ years work experience in functional area supervised. Normally reports to a Supervisor

Position: *Senior Examiner*

Functional Responsibility: Conduct examinations in accordance with the audit procedures developed regarding the financial condition and/or market conduct of companies and compliance with respective reporting requirements, laws, statutes and regulations. Provides analytical support to experienced staff members, including but not limited to research, financial and business process analysis and documentation of data, billing, and modeling. Prepare accurate, concise and complete detailed work papers to support procedures developed for engagements and to support all findings and/or errors pursuant to the instructions provided by government. Utilize Audit Command Language (ACL) to analyze data and select samples. Correspond with clients, examinees, and all examination team members.

Education/Experience: Bachelors Degree and 4+ years work experience in functional area.

Position: *Examiner*

Functional Responsibility: Tasked with examination of particular aspects of a company or organization (i.e. financial, market conduct). Investigate if organizational policies and procedures of company are being complied with in accordance with reporting requirements and applicable laws, statutes and regulations. Examine source documents to substantiate examination procedures and objectives. Reports to the Examiner-In-Charge.

Education/Experience: Bachelors Degree and 2+ years experience in functional area.

Position: *Junior Examiner*

Functional Responsibility: Tasked with examination of particular aspects of company or organization (i.e. financial, market conduct). Investigate if organizational policies and procedures of company are being complied with in accordance with reporting requirements and applicable laws, statutes and regulations. Examine source documents to substantiate examination procedures and objectives. Reports to Examiner-In-Charge.

Education/Experience: Bachelors Degree and 0+ years experience.

ACTUARIAL SERVICES

Position: *Actuary, Life & Health*

Functional Responsibility: Actuary with extensive specialized experience and recognized as an expert in actuarial matters. Serves on actuarial committees or makes presentations to actuarial organizations. Team leader with extensive interaction with clients.

Level	Title	Minimum Education	Minimum Experience	Certification Required
I	Actuary	Bachelors Degree Mathematical/Actuarial Discipline	6 years	FSA
II	Managing Actuary	Bachelors Degree Mathematical/Actuarial Discipline	8 years	FSA

Position: *Actuary, Property & Casualty*

Functional Responsibility: Actuary with extensive specialized experience and recognized as an expert in actuarial matters. Serves on actuarial committees or makes presentations to actuarial organizations. Team leader with extensive interaction with clients.

Level	Title	Minimum Education	Minimum Experience	Certification Required
I	Actuary	Bachelors Degree Mathematical/Actuarial Discipline	6 years	FCAS
II	Managing Actuary	Bachelors Degree Mathematical/Actuarial Discipline	8 years	FCAS

Position: Actuarial Analyst

Functional Responsibility: Familiarity with actuarial concepts but has not taken actuarial exams. Provides assistance to actuaries.

Education/Experience: Bachelors Degree and 2+ years experience.

SPECIALIZED SERVICES

Position: Director

Functional Responsibility: Senior expert with extensive knowledge and experience developing and applying analytic methods and principles to meet client needs. Leads application of analytics within an engagement team. Resolves complex problems, advises senior staff on analytic models, methods and policies. Facilitate projects with new clientele and oversee staff assigned to ensure client expectations and requirements are met. Maintain client relations and address any concerns and/or issues from the client and/or company management. Manage staffing on projects and provide guidance, training and assistance, as needed. Involved with indirect supervision and “big picture” problem solving. Responsible for marketing, networking and business development, as well as maintaining key client relationships. Client contact for complex questions and information. Advises client on various economic and legal risks in given industry. Provide presentations, for both educational and marketing purposes to achieve strategic goals.

Education/Experience: Bachelors Degree and 8+ years experience.

Position: Supervisor

Functional Responsibility: Supervise/coordinate daily activities of project team members. Responsible for the direction of activities of engagements and assignment of work detail to staff. Review completed work and perform quality checks on output of designated systems and employees. Leads and reviews results of projects and assignments. Identifies and discusses key financial and non-financial performance measures. Formulates and communicates project plans and assignments. May answer complex questions involving extensive technical skill. Reviews potentially complex financial statements, disclosures, and/or returns. Is a technical/subject matter expert or function leader. Creates presentations, databases and reports. Possesses demonstrated knowledge of applying analytic methodologies to meet client’s needs. Applies techniques in the evaluation of engagement objectives and contributes to implementation of strategic direction.

Education/Experience: Bachelors Degree with 8+ years work experience

Position: Information Systems/ (IT) Specialist

Functional Responsibility: Performs duties of significant importance; specialized in the field of information systems/technology. Makes recommendations in areas of expertise. Develops program goals and plans for implementation. Develops alternative strategies for programs based on analysis and research in an assigned specialty area. Serves as a technical advisor and liaison with industry, community groups, and/or governmental agencies. Participates on projects of significance to the firm's operations. Prepares special studies and reports. Tasked with analysis and testing of computer systems and the flow of and integrity of data produced for a company or organization. Investigates if an organization is in compliance with information system standards, policies and procedures. Examines source documents to substantiate if current policies are in the best interest of organization. May answer complex questions involving extensive technical skill. Is a technical/subject matter expert or function leader. Manages quality and risk. Supervise, training and development of staff, if applicable.

Education/Experience: Bachelors Degree and 8+ years experience.

Applicable training or certification requirements: *CISA*

Position: *Reinsurance Specialist*

Functional Responsibility: Performs duties of significant importance specialized in the field of reinsurance and the associated transactions. Makes recommendations in areas of expertise. Develops program goals and plans for implementation. Develops alternative strategies for programs based on analysis and research in an assigned specialty area. Serves as a technical advisor and liaison with industry, community groups, and/or governmental agencies. Participates on projects of significance to the firm's operations. Prepares special studies and reports. Coordination of examinations of reinsurance including assessment, gathering and analysis of information. Review of internal processes for compliance with MAR2010, SOX, and key internal controls and procedures relating to reinsurance. Interpret contracts for the appropriate GAAP & Statutory accounting and reporting requirements. May answer complex questions involving extensive technical skill. Is a technical/subject matter expert or function leader. Manages quality and risk. Supervise, training and development of staff, if applicable.

Education/Experience: Bachelors Degree and 10+ years experience.

Position: *Benefit Specialist*

Functional Responsibility: Perform policy form reviews with a primary focus on the review of templates, testing justification forms and other related documents for both the individual and group markets as it relates to the Affordable Care Act (ACA)

Key Responsibilities:

- Perform a review of Issuers' policy forms, including; the contract and contract amendments; policy forms; certificates and outlines of coverage; amendment notifications; policy riders and endorsements; documents related to waivers or opt-outs; marketing materials; applications; and notices to determine compliance with the applicable provisions of Title XXVII of the Public

Health Service Act (PHSA) for purposes of determining compliance with the requirements of the ACA;

- Review and determine the substantially equal equivalent for each benefit in comparison to Benefits provided in the state Essential Health Benefit plan;
- Review any deficiencies by utilizing tools to determine appropriateness of the deficiencies;
- Review tool deficiency justifications for acceptability;
- Ensure issuer compliance of market-wide requirements of Title XXVII of the PHSA; and,
- Document in writing findings and reports of examinations, as needed

Education/Experience: Bachelors Degree and 10+ years experience.