General Services Administration (GSA)
Federal Supply Service
Authorized Federal Supply Schedule Price List

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

LEWIS & ELLIS
Actuaries and Consultants

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

Contract Number: GS-23F-0083N
Contract Period: December 12, 2017 through December 11, 2022
Pricelist current through Modification: PS-A824 dated September 2, 2020
Business Size: Large Business

Contact for Contract Administration:
Cabe Chadick, FSA, MAAA
President & Managing Principal
ccchadick@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
TABLE OF CONTENTS

1a. TABLE OF AWARDED SPECIAL ITEM NUMBERS (SINs): ..................................................................................................................
1b. LOWEST PRICED MODEL NUMBER AND PRICE FOR EACH SIN: ..................................................................................................
1c. HOURLY RATES: (Services Only): .........................................................................................................................................
2. MAXIMUM ORDER: .................................................................................................................................................................
3. MINIMUM ORDER: ...................................................................................................................................................................
4. GEOGRAPHIC COVERAGE: .........................................................................................................................................................
5. POINT(S) OF PRODUCTION: .......................................................................................................................................................
6. DISCOUNT FROM LIST PRICES: ................................................................................................................................................
7. QUANTITY DISCOUNT(S): ...........................................................................................................................................................
8. PROMPT PAYMENT TERMS: ........................................................................................................................................................
9A. GOVERNMENT PURCHASE CARDS MUST BE ACCEPTED AT OR BELOW THE MICRO-PURCHASE THRESHOLD: .................
9B. GOVERNMENT PURCHASE CARDS ARE ACCEPTED ABOVE THE MICRO-PURCHASE THRESHOLD: ..................................
10. FOREIGN ITEMS: .....................................................................................................................................................................
11a. TIME OF DELIVERY: ...........................................................................................................................................................
11b. EXPEDITED DELIVERY: ........................................................................................................................................................
11c. OVERNIGHT AND 2-DAY DELIVERY: ....................................................................................................................................
11d. URGENT REQUIREMENTS: ......................................................................................................................................................
12. FOB POINT: ................................................................................................................................................................................
13a. ORDERING ADDRESS: .............................................................................................................................................................
13b. ORDERING PROCEDURES: ......................................................................................................................................................
14. PAYMENT ADDRESS: .................................................................................................................................................................
15. WARRANTY PROVISION: ..............................................................................................................................................................
16. EXPORT PACKING CHARGES: ......................................................................................................................................................
17. TERMS AND CONDITIONS OF GOVERNMENT PURCHASE CARD ACCEPTANCE: .........................................................
18. TERMS AND CONDITIONS OF RENTAL, MAINTENANCE, AND REPAIR (IF APPLICABLE): .............................................
19. TERMS AND CONDITIONS OF INSTALLATION (IF APPLICABLE): .........................................................................................
20. TERMS AND CONDITIONS OF REPAIR PARTS INDICATING DATE OF PARTS PRICE LISTS AND ANY DISCOUNTS FROM LIST PRICES (IF AVAILABLE): ...........................................................................................
20a. TERMS AND CONDITIONS FOR ANY OTHER SERVICES (IF APPLICABLE): ........................................................................
21. LIST OF SERVICE AND DISTRIBUTION POINTS (IF APPLICABLE): ....................................................................................
22. LIST OF PARTICIPATING DEALERS (IF APPLICABLE): .............................................................................................................
23. PREVENTIVE MAINTENANCE (IF APPLICABLE): .....................................................................................................................
24a. SPECIAL ATTRIBUTES SUCH AS ENVIRONMENTAL ATTRIBUTES ....................................................................................
24b. SECTION 508 COMPLIANCE FOR EIT: ....................................................................................................................................
25. DUNS NUMBER: ........................................................................................................................................................................
26. 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.
### 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></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Managing Actuary</td>
<td>$539.69</td>
<td>$548.33</td>
<td>$557.10</td>
</tr>
<tr>
<td>Managing Actuary</td>
<td>$438.71</td>
<td>$445.73</td>
<td>$452.86</td>
</tr>
<tr>
<td>Staff Actuary</td>
<td>$313.63</td>
<td>$318.65</td>
<td>$323.75</td>
</tr>
<tr>
<td>Senior Actuarial Technician</td>
<td>$248.12</td>
<td>$252.09</td>
<td>$256.13</td>
</tr>
<tr>
<td>Actuarial Technician</td>
<td>$186.71</td>
<td>$189.70</td>
<td>$192.74</td>
</tr>
<tr>
<td>Information Technology Support</td>
<td>$265.46</td>
<td>$269.71</td>
<td>$274.02</td>
</tr>
<tr>
<td>Administrative Support</td>
<td>$135.65</td>
<td>$137.82</td>
<td>$140.02</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

**Senior Managing Actuary**
Actuary with a minimum of 20 years of marketing development experience and management expertise necessary for overseeing the particular project. Educational requirements include a BA or BS in mathematics or a related field.

**Managing Actuary**
Actuary with a minimum of 20 years of management expertise necessary for overseeing the particular project. Educational requirements include a BA or BS in mathematics or a related field.

**Staff Actuary**
Actuarial staff member with more than 5 years of applicable experience to the particular project. Educational requirements include a BA or BS in mathematics or a related field.

**Senior Actuarial Technician**
Actuarial staff member with a minimum of 2 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. Educational requirements include a BA or BS in mathematics or a related field.

**Actuarial Technician**
Actuarial staff member with a minimum of 2 years of applicable experience to the project, who has not reached Associateship as defined by the Society of Actuaries. Educational requirements include a BA or BS in mathematics or a related field.

**Information Technology Support**
Works with end user groups to evaluate and solve technical problems. Analyzes, designs, and implements system changes. Familiar with a variety of the field’s concepts, practices, and procedures. Relies on experience and judgment to plan and accomplish goals. Educational requirements include at least a high school diploma and at least 1 year of experience in the field or in a related area.

**Administrative Support**
6 months or more experience in providing administrative support services. Educational requirements include a high school diploma.
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.

9A. **GOVERNMENT PURCHASE CARDS MUST BE ACCEPTED AT OR BELOW THE MICRO-PURCHASE THRESHOLD.**

Yes, Lewis & Ellis, Inc. accepts Government Purchase Cards at or below the micro-purchase threshold.

9B. **GOVERNMENT PURCHASE CARDS ARE ACCEPTED ABOVE THE MICRO-PURCHASE THRESHOLD.**

Yes, Lewis & Ellis, Inc. accepts Government Purchase Cards above the micro-purchase threshold.

10. **FOREIGN ITEMS:**

None

11a. **TIME OF DELIVERY:**

As agreed in task order.

11b. **EXPEDITED DELIVERY:**

N/A
11c. OVERNIGHT AND 2-DAY DELIVERY:
As agreed in task order.

11d. URGENT REQUIREMENTS:
As agreed in task order.

12. FOB POINT:
Destination

13a. ORDERING ADDRESS:
Lewis & Ellis, Inc.
700 CENTRAL EXPY S STE 550
ALLEN, TX 75013-8125
P: 913-491-3388
F: 913-642-9777

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

15. WARRANTY PROVISION:
N/A

16. EXPORT PACKING CHARGES:
N/A

17. TERMS AND CONDITIONS OF GOVERNMENT PURCHASE CARD ACCEPTANCE:
Lewis & Ellis, Inc. will accept government purchase cards for payment below, equal to and above the Micro-purchase threshold level.

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 AVAILABLE):
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. SPECIAL ATTRIBUTES SUCH AS ENVIRONMENTAL ATTRIBUTES
N/A

24b. SECTION 508 COMPLIANCE FOR EIT:
The EIT Standards can be found at: www.section508.gov/

25. DUNS NUMBER:
075123133

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