

Deferred Compensation Board

1120221

**FORM B****OSC Use Only:**

Reporting Code:

Category Code:

**State Consultant Services**  
**Contractor's Annual Employment Report**  
**Report Period: April 1, 2024 to March 31, 2025**

Contracting State Agency Name: New York State Deferred Compensation Plan  
Agency Code: 21723  
Contract Number: C240001  
Contract Term: 10/01/2024 – 09/30/2029  
Contractor Name: Citrin Cooperman Advisors, LLC and Citrin Cooperman and Company, LLP  
Contractor Address: 50 Rockefeller Plaza, New York, NY 10020  
Description of Services Being Provided: Audited Financial Statements and Performance Criteria Report

**Scope of Contract (Choose one that best fits):**

Analysis ☐ Evaluation ☐ Research ☐ Training ☐  
Data Processing ☐ Computer Programming ☐ Other IT consulting ☐  
Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services ☐  
Health Services ☐ Mental Health Services ☐  
Accounting ☐ Auditing ☒ Paralegal ☐ Legal ☐ Other Consulting ☐

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
Partner	2	94	16308
Director	1	37	4368
Manager	2	95	11877
Senior	2	227	19441
Staff	2	519	42886
Paraprofessional	2	2	140
Total this page	11	974	\$ 95000
Grand Total	11	974	95000

Name of person who prepared this report: Kevin Burns

Preparer's Signature: Kevin Burns

Title: Partner

Phone #: 212-697-1000

Date Prepared: 5/2/2025

Use additional pages if necessary)

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**Contractor's Annual Employment Report**  
**Report Period: April 1, 2024 to March 31, 2025**

Contracting State Agency Name: New York State Deferred Compensation Plan  
Agency Code: 21723  
Contract Number: C100002  
Contract Term: 04/01/2022 to 03/31/2027  
Contractor Name: Callan LLC  
Contractor Address: 1 Deforest Ave., Suite 101, Summit, NJ 07901  
Description of Services Being Provided: Investment Consulting

**Scope of Contract (Choose one that best fits):**

Analysis ☐ Evaluation ☐ Research ☐ Training ☐  
Data Processing ☐ Computer Programming ☐ Other IT consulting ☐  
Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services ☐  
Health Services ☐ Mental Health Services ☐  
Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☐ Other Consulting ☒

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
Retainer Fee for 4/1/24 – 3/31/25 – billed \$36,500.00- June, Sept, Dec 2024 & March 2025			\$146,000.00
Balanced & Multi Asset Credit Fund Searches 2/28/2025			\$50,000.00
Passive U.S. Large Cap Equity, Passive U.S. SMID Cap Equity & Passive U.S. Core Fixed Income 12/31/2024			\$30,000.00
Six Active U.S. Equity RFPs - Large Cap Value Large Cap Core, Large Cap Growth, SMID Cap Core, Small Cap Value & Small Cap Growth. (Note total of \$70K – \$35K billed 2/29/24 outside the requested timeframe of this Form B)			\$35,000.00
Total this page			\$261,000.00
Grand Total			\$261,000.00

Name of person who prepared this report: Thomas Shingler

Preparer's Signature: Thomas Shingler

Title: SVP

Phone #: 908.522.3880

Date Prepared: 04/21/2025

Use additional pages if necessary)

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**Report Period: April 1, 2024 to March 31, 2025**


Contracting State Agency Name: NYS Deferred Compensation Plan Agency Code: 21723  
Contract Number: **State Plan – 240006**  
Contract Term: 12/1/2024 - 11/30/2029  
Contractor Name: Groom Law Group, Chartered  
Contractor Address: 1701 Pennsylvania Ave., NW, Suite 1200, Washington, DC 20006  
Description of Services Being Provided: Legal

**Scope of Contract (Choose one that best fits):**

Analysis ☐ Evaluation ☐ Research ☐ Training ☐  
Data Processing ☐ Computer Programming ☐ Other IT consulting ☐  
Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services ☐  
Health Services ☐ Mental Health Services ☐  
Accounting ☐ Auditing ☐ Paralegal ☐ Legal X ☒ Other Consulting ☐

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
State Plan	8	319.25	245,573.75
Total this page			
Grand Total	8	319.25	245,573.75

Name of person who prepared this report: Victor Elmann

Preparer's Signature: 

Title: Collections Manager

Phone #: 202-861-9377

Date Prepared: 4/18/2025

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**State Consultant Services**  
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**Report Period: April 1, 2024 to March 31, 2025**

Contracting State Agency Name: NYS Deferred Compensation Plan Agency Code: 21723  
Contract Number: **Model Plans – 240007**  
Contract Term: 12/1/2024 - 11/30/2029  
Contractor Name: Groom Law Group, Chartered  
Contractor Address: 1701 Pennsylvania Ave., NW, Suite 1200, Washington, DC 20006  
Description of Services Being Provided: Legal

**Scope of Contract (Choose one that best fits):**

Analysis ☐ Evaluation ☐ Research ☐ Training ☐  
Data Processing ☐ Computer Programming ☐ Other IT consulting ☐  
Engineering ☐ Architect Services ☐ Surveying ☐ Environmental Services ☐  
Health Services ☐ Mental Health Services ☐  
Accounting ☐ Auditing ☐ Paralegal ☐ Legal ☒ Other Consulting ☐

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
Model Plan	0	0	0
Total this page			
Grand Total	0	0	0

Name of person who prepared this report: Victor Elmann

Preparer's Signature: 

Title: Collections Manager Phone #: 202-861-9377

Date Prepared: 5 / 7 / 2025

(Use additional pages if necessary)

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