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, 2025 to March 31, 2026

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
Annua Retainer Fee for 4/1/2025 – 3/31/2026. This fee is billed quarterly (June, Sept, Dec 2025, March 2026).			$146,000.00
Active ESG Equity Search April 2025			$30,000.00
Total this page	0	0	$ 176,000.00
Grand Total			

Name of person who prepared this report: Thomas Shingler
Preparer's Signature: Thomas Shingler
Title: SVP Phone #: 908.522.3880
Date Prepared: 04/28/2026

Use additional pages if necessary)

FORM B

OSC Use Only:
Reporting Code:
Category Code:

State Consultant Services
Contractor's Annual Employment Report
Report Period: April 1, 2025 to March 31, 2026

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	35	4476
Director	1	61	7682
Manager	1	17	4348
Senior	2	180	31967
Staff	2	205	45385
Paraprofessional	1	9	1142
Total this page	9	507	$ 95000
Grand Total			

Name of person who prepared this report: Kevin Burns
Preparer's Signature: Kevin Burns
Title: Partner Phone #: 212-697-1000
Date Prepared: 4/30/2026

Use additional pages if necessary) Page of

FORM B

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State Consultant Services
Contractor's Annual Employment Report
Report Period: April 1, 2025 to March 31, 2026

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 ☒ Other Consulting ☐

Employment Category	Number of Employees	Number of Hours Worked	Amount Payable Under the Contract
State Plan	13	549.25	461,497.25
Total this page			
Grand Total	13	549.25	461,497.25

Name of person who prepared this report: Victor Elmann
Preparer's Signature: _____
Title: Collections Manager Phone #: 202-861-9377
Date Prepared: 04 / 08 / 2026

(Use additional pages if necessary) Page of

FORM B

OSC Use Only:
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State Consultant Services
Contractor's Annual Employment Report
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 Plans	2	2.25	1,946.25
Total this page			
Grand Total	2	2.25	1,946.25

Name of person who prepared this report: Victor Elmann
Preparer's Signature: 
Title: Collections Manager Phone #: 202-861-9377
Date Prepared: 04/08/2026

(Use additional pages if necessary) Page of