

**CONTRACT ROUTING FORM**

1. Complete the information below BEFORE printing and completing items 2 through 7. Items in red are required.

Department: County Manager's Office  
Department contract file name (use effective date): HRWS\_HR\_20240712  
Project Code: Click here to enter text.  
Contract type: Agreement  
Contracted Services/Goods: ERISA 401(k) Nondiscrimination Testing  
Contract Component: Master  
Change Order Number/Addendum Number: Click here to enter text.  
Vendor Name: HR Workplace Services, Inc.  
Effective Date: 7/12/2024  
Approved by: County Manager  
Ending Date: Click here to enter a date.  
Total Amount: \$150.00

2. Department Head or his/her designee has read the contract in its entirety.  
By: Courtney Jones (Department Head signature required)

3. County Attorney has reviewed and approved the contract   
County Attorney has reviewed and rejects the contract  Reason: \_\_\_\_\_

This is an automatic renewal and does not require approval from the County Attorney: Yes  No

If this box is checked the County Attorney's Office has reviewed the contract but has not made needed changes to protect the County because the contract is a sole source contract and the services required by the County are not available from another vendor.

4. Technical/MIS Advisor has reviewed the contract if applicable. Yes  No

5. Vendor has signed the contract. Yes  No

6. A budget amendment is necessary before approval. Yes  No   
If budget amendment is necessary, please attach to this form.

7. Approval

Requires approval by the BOC - contracts over \$100,000.00. Follow Board submission guidelines.

Requires approval by the Manager – contracts \$100,000 or less.

8. Submit to Clerk.

**Clerk's Office Only**

- Finance Officer has signed the contract
- The Finance Officer is not required to sign the contract

## HRWS ERISA Services Agreement

**"HRWS":** HR Workplace Services, Inc.  
**Address:** 15001 N. 74<sup>th</sup> Street, Scottsdale, AZ 85260

**"Client":** County of Chatham  
**Address:** 12 East St Pittsboro, NC 27312 United States

**Contact Name:** Dan Lamontagne  
**Title:** County Manager  
**Telephone:** (919) 542-8200  
**Email:** dan.lamontagne@chathamcountync.gov

### AGREEMENT:

HR Workplace Services, Inc., a Nevada corporation ("HRWS"), will provide to Client the requested information for the ERISA product/service(s) as identified below.

Agreements must be submitted with full payment before HRWS will begin work on the document(s)/service(s). Preparation of documents will begin upon receipt of completed Information Request and supporting documents.

HRWS provides any and all documents solely to encourage human resource best practices and does not provide legal advice and makes no representation or warranty regarding content provided by the Client that is incorporated into any such documents. HRWS shall not be responsible for Client's failure to fully disclose any individual plan information, participation requirements, Plan Certificates, etc.

**By signing below, the undersigned certify that they have read and understand, and agree to be legally bound by, this Agreement.**

**Contract Start Date:** 7/12/2024 **Total:** 150.00  
**Reporting Year(s):** 2023

### Product Detail:

Quantity	ID	Description	Unit Price	Extended Price
1.00	NONDISCRIMTST	Non-discrimination Testing	150.00	150.00

### Bill To:

County of Chatham  
12 East St  
Pittsboro  
NC  
27312

### Ship To:

County of Chatham  
12 East St  
Pittsboro  
NC  
27312

**ACCEPTED FOR** County of Chatham

Name: Dan Lamontagne

Title: County Manager

Signed:

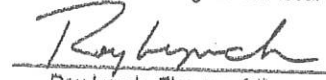


(Authorized Signature)

Date:

7/16/2024

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.



Roy Lynch, Finance Officer

**ACCEPTED FOR HR WORKPLACE SERVICES, INC.**

Name:

Title:

Signed:

(Authorized Signature)

Date:

HR Workplace Services, Inc. does not provide legal advice and nothing in this communication should be considered as such. Employers or other clients seeking legal advice should seek legal counsel in their appropriate jurisdiction. This Agreement shall be governed by the laws of the State of Nevada as if fully executed therein; exclusive venue for any dispute arising hereunder shall be Maricopa County, Arizona.