

**New York State Office of the State Comptroller  
Single/Sole Source Award**

Pursuant to New York State Finance Law §163.10(b), the New York State Office of the State Comptroller (OSC) is presenting the following summary of relevant circumstances and substantial reasons why a competitive procurement was not feasible.

<b>Category:</b>	Financial – Consulting & Other Services	<b>Contract/Purchase Order Number:</b>	C000891, Amendment 6
<b>Title of Services:</b>	Program Management Services for the New York State 529 College Choice Tuition Savings Program		
<b>Description:</b>	Consistent with Section 144(2)(a) of the New York Economic Development Law (EDL), the NYS Office of State Comptroller (OSC) requested an exemption from publishing this procurement contract opportunity in the procurement opportunities newsletter (the NYS Contract Reporter). In accordance with Section 144(2)(b) of the EDL, the OSC Bureau of Contracts has granted the exemption.		
<p>The Bureau of Contracts on 4/19/2021 approved a request for exemption from giving notice in the New York State Contract Reporter for a two-year extension of program management services for the New York State 529 College Choice Tuition Savings Program from Ascensus Broker Dealer Services, LLC, J.P. Morgan Investment Management Inc., JPMorgan Distribution, Inc., and The Vanguard Group, Inc.</p> <p>Due to the specific circumstances of this procurement and the unique qualifications of the selected firm, a competitive procurement was not feasible in this instance.</p>			
<b>Minority Sub-Contracting Goal:</b>	6.2%	<b>Women Owned Sub-Contracting Goal:</b>	0%
<b>Contract Term:</b>	5/7/2021-5/6/2023	<b>Out-of-State/Foreign Vendor: (Y/N)</b>	Y
<b>Location:</b>	110 State Street	<b>Amount:</b>	\$76,550,330.00