

**EXHIBIT A**  
**DESCRIPTION OF GOODS & SERVICES**

Contractor shall provide the printing, packaging and delivery of the CT-1040 and CT-1040NR/PY booklets and flat forms as specified in this Exhibit A.

**Option 1**

**Item 1.**

<b>AGENCY:</b>	Department of Revenue Services (DRS)
<b>ADDRESS:</b>	450 Columbus Blvd, Suite 1, Hartford CT 06103-1837
<b>AGENCY CONTACT:</b>	Don Knybel, 860-297-5658
<b>TITLE OF PRINTING:</b>	<b>CT-1040</b>
<b>QUANTITY:</b>	<b>80,008 booklets and 73,010 flat forms</b>
<b>DATE REQUIRED:</b>	<b>12/20/19 - (see detailed instructions in paragraphs to follow)</b>
<b>DATE LAST PURCHASED:</b>	December, 2018
<b>LAST TOTAL QUANTITY AND PRICE:</b>	80,000 booklets and 73,000 flat forms
<b>DELIVER TO:</b>	See instructions
<b>PROOFS REQUIRED:</b>	3 sets of proofs for structure only
<b>FORMAT:</b>	Booklet and flat form
<b>NO. OF PAGES:</b>	4 bond cover; 10 removable bond; 2 non-removable bond; 24 newsprint
<b>TRIM SIZE:</b>	8-1/2" x 10-7/8"
<b>BINDING:</b>	2 wire saddle stitched
<b>INK COLOR(S):</b>	4 page bond cover = 3 colors: blue (pantone 293), red (pantone 199), and black
	10 bond pages = 3 colors: blue (pantone 293), red (pantone 199), and black
	Newsprint = black
<b>PAPER STOCK:</b>	Bond cover; removable & non-removable bond = 20 lb., white
	28 lb. newsprint
<b>BOOKLET COPY PROVIDED:</b>	<b>Client Agency shall provide Electronic file to Contractor by November 5</b>
<b>PROOFS:</b>	Client Agency will need five (5) working days to review proof copies and three (3) working days to reproof initial proof changes
<b>ADDITIONAL FLATS</b>	<b>73,010</b> Form CT-1040 flat forms – 4 pages (printed back to back); bond only; 17 x 11; three colors (3 colors: blue (pantone 293), red (pantone 199), and black); printed on 50lb offset to the same size as the forms in the tax booklets (8 1/8 x 10 5/8 folded to 4 pgs. or 16-1/2 x 10-5/8 flat). Perforated at the fold. Shrink wrapped in bundles of 35.
<b>OTHER INSTRUCTIONS -</b>	

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**Booklets**

The 10 removable bond pages must have a clean perforation on the spine to allow easy tear-out (16-tooth perf blade.)

First 25 copies off the press to be shipped overnight to:

**Department of Revenue Services**  
**Attn: David Burke**  
**450 Columbus Blvd, Suite 1**  
**Hartford CT 06103-1837**

60,008 booklets must be bulk mailed to specified locations in lots of 26 in pre-printed corrugated display box (2,308 boxes). Any shipping box used must be standard corrugated shipping box clearly marked as **Connecticut Form CT-1040 Books**.

Client Agency shall email Contractor an Excel format list of all bulk mailing names and addresses, postal zones, and quantities on 12/6/19. Contractor shall provide the Client Agency written documentation as to the best method the bulk deliveries will be mailed. The Client Agency shall provide written approval of the delivery method prior to shipment of the Goods.

Client Agency shall provide Contractor the art work for display box that contains the 26 books. The carton must be produced with removable perforations to create a display box.

Bulk mailings shall begin on or after 12/20/19 and must be completed by 12/30/19.

The Contractor shall provide Client Agency all mailing receipts regarding the bulk deliveries upon completion of the mailing. All 3602r and 3607 postal receipts must be made available on the United States Postal Service (USPS) website within 48 hours after mailing. Client Agency shall open a postal permit account with the USPS office in the city/state the Contractor plans on utilizing to mail the booklets. Client Agency shall fund the permit account. The Contractor shall provide all mailing receipts upon completion of the mailing.

The remaining balance of 20,000 booklets must be shipped to Department of Revenue Services (DRS) in lots of 100 in standard corrugated box (200 boxes.) The shipping carton with 100 books must be standard corrugated box clearly marked as **Connecticut Form CT-1040 - 100 Books**.

Remaining cartons and boxes of 20,000 booklets must be delivered to:

Department of Revenue Services  
25 Charles Street, North Dock  
Hartford, CT 06103

Contractor shall contact Ric Barry at 860-297-5724 to arrange a date and time for delivery of the booklets.

**Flat Forms**

Flat forms (in lots of 35 shrink wrapped bundles) must be boxed in generic corrugated containers identified as "**2019 CT-1040 Flat Forms**" and shipped to Client Agency by 12/9/19. Deliver to:

Department of Revenue Services  
25 Charles Street, North Dock  
Hartford, CT 06103

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Contractor shall contact Ric Barry at 860-297-5724 to arrange a date and time for delivery of the flat forms.

**Option 1**  
**Item 2:**

<b>AGENCY:</b>	Department of Revenue Services (DRS)
<b>ADDRESS:</b>	450 Columbus Blvd, Suite 1, Hartford CT 06103-1837
<b>AGENCY CONTACT:</b>	Don Knybel, 860-297-5658
<b>TITLE OF PRINTING:</b>	<b>CT-1040NR/PY</b>
<b>QUANTITY:</b>	<b>10,000</b>
<b>DATE REQUIRED:</b>	<b>12/20/19 –(see detailed instructions in paragraphs to follow)</b>
<b>DATE LAST PURCHASED:</b>	December, 2018
<b>LAST TOTAL QUANTITY AND PRICE:</b>	10,000 = \$5,150
<b>DELIVER TO:</b>	See instructions
<b>PROOFS REQUIRED:</b>	3 sets of proofs for structure only
<b>FORMAT:</b>	Booklet
<b>NO. OF PAGES:</b>	4 bond cover; 10 removable bond; 2 non-removable bond; 20 newsprint
<b>TRIM SIZE:</b>	8-1/2" x 10-7/8"
<b>BINDING:</b>	2 wire saddle stitched
<b>INK COLOR(S):</b>	Cover = 4 bond with 2 colors: red (pantone 199) and black 12 bond pages: 8 pages = 2 colors: red (pantone 199); and black; and 4 pages = one color; black Newsprint = black
<b>PAPER STOCK:</b>	Bond cover and removable bond = 20lb, white, 28 lb. Newsprint
<b>BOOKLET COPY PROVIDED:</b>	<b>Client Agency shall provide Electronic file to Contractor by November 12</b>
<b>PROOFS:</b>	Client Agency will need five(5) working days to review proof copies and three (3) working days to reproof initial proof changes
<b>ADDITIONAL FLATS</b>	<b>none</b>
<b>OTHER INSTRUCTIONS</b>	

The 10 removable bond pages must have a clean perforation on the spine to allow easy tear-out (16-tooth perf blade.)

First 25 copies off the press to be shipped overnight to:

**Department of Revenue Services**  
**Attn: David Burke**  
**450 Columbus Blvd, Suite 1**  
**Hartford CT 06103-1837**

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8,000 booklets must be bulk mailed to specified locations in lots of 16 in pre-printed corrugated display box (500 boxes). Any shipping box must be standard corrugated shipping box clearly marked as **Connecticut Form CT-1040NRPY**.

Client Agency shall email Contractor an Excel format list of all bulk mailing names and addresses, postal zones, and quantities on 12/6/19. Contractor shall provide the Client Agency written documentation as to the best method the bulk deliveries will be mailed. The Client Agency shall provide written approval of the delivery method prior to shipment of the Goods.

Client Agency shall provide Contractor the art work for display box that contains the 16 books. The shipping carton must be produced with removable perforations to create a display box.

The Contractor shall provide Client Agency all mailing receipts regarding the bulk deliveries upon completion of the mailing. All 3602r and 3607 postal receipts must be made available on the United States Postal Service (USPS) website within 48 hours after mailing. Client Agency shall open a postal permit account with the USPS office in the city/state the Contractor plans on utilizing to mail the booklets. Client Agency shall fund the permit account. The Contractor shall provide all mailing receipts upon completion of the mailing.

The remaining balance of 2,000 booklets must be shipped to Department of Revenue Services (DRS) in lots of 50 in standard corrugated box (40 boxes). Shipping carton with 50 books must be standard corrugated box clearly marked as **Connecticut Form CT-1040 - 50 Books**.

The remaining cartons and boxes of 2,000 booklets must be delivered to:

Department of Revenue Services  
25 Charles Street, North Dock  
Hartford, CT 06103

Contractor shall contact Ric Barry at 860-297-5724 to arrange a date and time for delivery of the booklets.

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**Option 2**  
**Item 1.**

<b>AGENCY:</b>	Department of Revenue Services (DRS)
<b>ADDRESS:</b>	450 Columbus Blvd, Suite 1, Hartford CT 06103-1837
<b>AGENCY CONTACT:</b>	Don Knybel, 860-297-5658
<b>TITLE OF PRINTING:</b>	<b>CT-1040</b>
<b>QUANTITY:</b>	<b>60,050 booklets and 20,020 flat forms</b>
<b>DATE REQUIRED:</b>	<b>12/20/19 - (see detailed instructions in paragraphs to follow)</b>
<b>DATE LAST PURCHASED:</b>	December, 2018
<b>LAST TOTAL QUANTITY AND PRICE:</b>	80,000 booklets and 73,000 flat forms
<b>DELIVER TO:</b>	See instructions
<b>PROOFS REQUIRED:</b>	3 sets of proofs for structure only
<b>FORMAT:</b>	Booklet and flat form
<b>NO. OF PAGES:</b>	4 bond cover; 10 removable bond; 2 non-removable bond; 24 newsprint
<b>TRIM SIZE:</b>	8-1/2" x 10-7/8"
<b>BINDING:</b>	2 wire saddle stitched
<b>INK COLOR(S):</b>	4 page bond cover = 3 colors: blue (pantone 293), red (pantone 199), and black 10 bond pages = 3 colors: blue (pantone 293), red (pantone 199), and black Newsprint = black
<b>PAPER STOCK:</b>	Bond cover; removable & non-removable bond = 20 lb., white 28 lb. newsprint
<b>BOOKLET COPY PROVIDED:</b>	<b>Client Agency shall provide Electronic file to Contractor by November 5</b>
<b>PROOFS:</b>	Client Agency will need five (5) working days to review proof copies and three (3) working days to reproof initial proof changes
<b>ADDITIONAL FLATS</b>	<b>20,020</b> Form CT-1040 flat forms – 4 pages (printed back to back); bond only; 17 x 11; three colors (3 colors: blue (pantone 293), red (pantone 199), and black); printed on 50lb offset to the same size as the forms in the tax booklets (8 1/8 x 10 5/8 folded to 4 pgs. or 16-1/2 x 10-5/8 flat). Perforated at the fold. Shrink wrapped in bundles of 35.
<b>OTHER INSTRUCTIONS</b>	

**Booklets**

The 10 removable bond pages must have a clean perforation on the spine to allow easy tear-out (16-tooth perf blade.)

First 25 copies off the press to be shipped overnight to:

**Department of Revenue Services**  
**Attn: David Burke**  
**450 Columbus Blvd, Suite 1**  
**Hartford CT 06103-1837**

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50,050 booklets must be bulk mailed to specified locations in lots of 26 in pre-printed corrugated display box (1,925 boxes). Any shipping box used must be standard corrugated shipping box clearly marked as **Connecticut Form CT-1040**.

Client Agency shall email Contractor an Excel format list of all bulk mailing names and addresses, postal zones, and quantities on 12/6/19. Contractor shall provide the Client Agency written documentation as to the best method the bulk deliveries will be mailed. The Client Agency shall provide written approval of the delivery method prior to shipment of the Goods.

Client Agency shall provide Contractor the art work for display box that contains the 26 books. The carton must be produced with removable perforations to create a display box.

Bulk mailings shall begin on or after 12/20/19 and must be completed by 12/30/19.

The Contractor shall provide Client Agency all mailing receipts regarding the bulk deliveries upon completion of the mailing. All 3602r and 3607 postal receipts must be made available on the United States Postal Service (USPS) website within 48 hours after mailing. Client Agency shall open a postal permit account with the USPS office in the city/state the Contractor plans on utilizing to mail the booklets. Client Agency shall fund the permit account. The Contractor shall provide all mailing receipts upon completion of the mailing.

The remaining balance of 10,000 booklets must be shipped to Department of Revenue Services (DRS) in lots of 100 in standard corrugated box (100 boxes). The shipping carton with 100 books must be standard corrugated box clearly marked as **Connecticut Form CT-1040 - 100 Books**.

Remaining cartons and boxes of 10,000 booklets must be delivered to:

Department of Revenue Services  
25 Charles Street, North Dock  
Hartford, CT 06103

Contractor shall contact Ric Barry at 860-297-5724 to arrange a date and time for delivery of the booklets.

**Flat Forms**

Flat forms (in lots of 35 shrink wrapped bundles) must be boxed in generic corrugated containers identified as "**2019 CT-1040 Flat Forms**" and shipped to Client Agency by 12/9/19. Deliver to:

Department of Revenue Services  
25 Charles Street, North Dock  
Hartford, CT 06103

Contractor shall contact Ric Barry at 860-297-5724 to arrange a date and time for delivery of the flat forms.

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**Option 2**  
**Item 2:**

<b>AGENCY:</b>	Department of Revenue Services (DRS)
<b>ADDRESS:</b>	450 Columbus Blvd, Suite 1, Hartford CT 06103-1837
<b>AGENCY CONTACT:</b>	Don Knybel, 860-297-5658
<b>TITLE OF PRINTING:</b>	<b>CT-1040NR/PY</b>
<b>QUANTITY:</b>	<b>7,520</b>
<b>DATE REQUIRED:</b>	<b>12/20/19 – (see detailed instructions in paragraphs to follow)</b>
<b>DATE LAST PURCHASED:</b>	December, 2018
<b>LAST TOTAL QUANTITY AND PRICE:</b>	10,000 = \$5,150
<b>DELIVER TO:</b>	See instructions
<b>PROOFS REQUIRED:</b>	3 sets of proofs for structure only
<b>FORMAT:</b>	Booklet
<b>NO. OF PAGES:</b>	4 bond cover; 10 removable bond; 2 non-removable bond; 20 newsprint
<b>TRIM SIZE:</b>	8-1/2" x 10-7/8"
<b>BINDING:</b>	2 wire saddle stitched
<b>INK COLOR(S):</b>	Cover = 4 bond with 2 colors: red (pantone 199) and black 12 bond pages: 8 pages = 2 colors: red (pantone 199); and black; and 4 pages = one color; black Newsprint = black
<b>PAPER STOCK:</b>	Bond cover and removable bond = 20lb, white, 28 lb. Newsprint
<b>BOOKLET COPY PROVIDED:</b>	<b>Client Agency shall provide Electronic file to Contractor by November 12</b>
<b>PROOFS:</b>	Client Agency will need five(5) working days to review proof copies and three (3) working days to reproof initial proof changes
<b>ADDITIONAL FLATS</b>	<b>none</b>
<b>OTHER INSTRUCTIONS</b>	

The 10 removable bond pages must have a clean perforation on the spine to allow easy tear-out (16-tooth perf blade.)

First 25 copies off the press to be shipped overnight to:

**Department of Revenue Services**  
**Attn: David Burke**  
**450 Columbus Blvd, Suite 1**  
**Hartford CT 06103-1837**

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6,720 booklets must be bulk mailed to specified locations in lots of 16 in pre-printed corrugated display box (420 boxes). Any shipping box must be standard corrugated shipping box clearly marked as **Connecticut Form CT-1040NRPY**.

Client Agency shall email Contractor an Excel format list of all bulk mailing names and addresses, postal zones, and quantities on 12/6/19. Contractor shall provide the Client Agency written documentation as to the best method the bulk deliveries will be mailed. The Client Agency shall provide written approval of the delivery method prior to shipment of the Goods.

Client Agency shall provide Contractor the art work for display box that contains the 16 books. The shipping carton must be produced with removable perforations to create a display box.

The Contractor shall provide Client Agency all mailing receipts regarding the bulk deliveries upon completion of the mailing. All 3602r and 3607 postal receipts must be made available on the United States Postal Service (USPS) website within 48 hours after mailing. Client Agency shall open a postal permit account with the USPS office in the city/state the Contractor plans on utilizing to mail the booklets. Client Agency shall fund the permit account. The Contractor shall provide all mailing receipts upon completion of the mailing.

The remaining balance of 800 booklets must be shipped to Department of Revenue Services (DRS) in lots of 50 in standard corrugated box (16 boxes). Shipping carton with 50 books must be standard corrugated box clearly marked as **Connecticut Form CT-1040NRPY - 50 Books**.

The remaining cartons and boxes of 800 booklets must be delivered to:

Department of Revenue Services  
25 Charles Street, North Dock  
Hartford, CT 06103

Contractor shall contact Ric Barry at 860-297-5724 to arrange a date and time for delivery of the booklets.

**ADDITIONAL TERMS AND CONDITIONS:**

**(a) Contract Separately/Additional Savings Opportunities**

DAS reserves the right to either seek additional discounts from the Contractor or to contract separately for a single purchase, if in the judgment of DAS, the quantity required is sufficiently large, to enable the State to realize a cost savings, over and above the prices set forth in Exhibit B, whether or not such a savings actually occurs.

**(b) P-Card (Purchasing MasterCard Credit Card)**

Notwithstanding the provisions of Section 4(b)(2) of the Contract, purchases may be made using the State of Connecticut Purchasing Card (MasterCard) in accordance with Memorandum No. 2011-11 issued by the Office of the State Comptroller.

Contractor shall be equipped to receive orders issued by the Client Agency using the MasterCard. The Contractor shall be responsible for the credit card user-handling fee associated with MasterCard



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purchases. The Contractor shall charge to the MasterCard only upon acceptance of Goods delivered to the Client Agency or the rendering of Services.

The Contractor shall capture and provide to its merchant bank, Level 3 reporting at the line item level for all orders placed by MasterCard.

Questions regarding the state of Connecticut MasterCard Program may be directed to Ms. Kerry DiMatteo, Procurement Card Program Administrator at 860-713-5072.

**(c) Security and/or Property Entrance Policies and Procedures**

Contractor shall adhere to established security or property entrance policies and procedures or both for each requesting Client Agency. It is the responsibility of each Contractor to understand and adhere to those policies and procedures prior to any attempt to enter any Client Agency premises for the purpose of carrying out the scope of work described in this Contract.