



Independent Financial & Insurance Vendor Vetting for VA Procurements

Acquisition Risk Context (Problem Statement)

VA procurements involving financial, insurance, or benefits-adjacent advisory services present elevated fiduciary, reputational, and veteran-impact risk—particularly where vendors maintain commission-based incentives, conflicted compensation structures, or adverse regulatory history.

Capability Summary (What We Do)

ProGarrett Solutions LLC provides independent, third-party vetting and risk analysis **of financial advisors, brokers, registered investment advisers (RIAs), and insurance vendors** under consideration for VA use. Our reviews are conducted independent of product sales, commissions, or provider influence, enabling objective, conflict-free acquisition decision support.

Relevance to VA Acquisition & FAR Part 10

This capability supports FAR Part 10 market research by helping VA contracting and program offices: - Identify and assess vendor suitability prior to solicitation - Document conflict-free market research findings - Reduce fiduciary and suitability risk to veterans and beneficiaries - Support defensible acquisition strategies and source selection - Mitigate post-award, IG, GAO, or congressional scrutiny

Typical Use During the Acquisition Lifecycle

VA organizations typically engage this capability during: - FAR Part 10 market research and acquisition planning - Pre-RFP vendor screening and qualification assessment - Evaluation of financial, insurance, or advisory service providers - Internal compliance or procurement risk reviews

Typical Deliverables

Engagements typically produce a written vetting memorandum suitable for retention in the acquisition file, including: - License, registration, and credential verification - BrokerCheck / CRD and regulatory history review - Conflict-of-interest and compensation structure analysis - Plain-language risk findings for non-technical stakeholders - Documented conclusions supporting acquisition decisions

Firm Information

ProGarrett Solutions LLC

- SDVOSB (VOSB)
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