



2021 Compliance Packages

Groups Under 100

Services	ERISA Starter	ERISA Standard	ERISA Supreme
One Wrap Plan Document and Summary Plan Description	✓	✓	✓
One Premium Only Plan (POP) Document and Summary Plan Description	✓	✓	✓
Unlimited Amendments/SMMs to Wrap and POP Plan Documents	✓	✓	✓
Compliance Alert Service	✓	✓	✓
Recordkeeping Assistance	✓	✓	✓
\$250 Discount on ACA Employer Reporting and FTE Tracking Services for ALEs	✓	✓	✓
Premium Only Plan Nondiscrimination Testing		✓	✓
Annual Compliance Checklist Conference Call		✓	✓
Consultative Support for Common ERISA Welfare Plan and Cafeteria Plan Inquiries		✓	✓
Document Checkup (every 3 years)			✓
HIPAA Privacy Policy Documentation Package			✓
Annual HIPAA Privacy Training (maximum 3 hours)			✓



2021 Compliance Packages

Groups Over 100

Services	ERISA Starter	ERISA Standard	ERISA Supreme
One Wrap Plan Document and Summary Plan Description	✓	✓	✓
One Section 125 Plan Document and Summary Plan Description	✓	✓	✓
Unlimited Amendments/SMMs to Wrap and Section 125 Plan Documents	✓	✓	✓
One Form 5500 Preparation and Filing, including SAR	✓	✓	✓
Compliance Alert Service	✓	✓	✓
Recordkeeping Assistance	✓	✓	✓
\$250 Discount on ACA Employer Reporting and FTE Tracking Services for ALEs	✓	✓	✓
5% Discount on Fringe Benefits and COBRA Administration for employers with 250+ benefit eligible employees	✓	✓	✓
Section 125 Plan Nondiscrimination Testing		✓	✓
Annual Compliance Checklist Conference Call		✓	✓
Consultative Support for Common ERISA Welfare Plan and Cafeteria Plan Inquiries		✓	✓
Document Checkup (every 3 years)			✓
HIPAA Privacy Policy Documentation Package			✓
Annual HIPAA Privacy Training (maximum 3 hours)			✓