



POWER

*through Partnership*

AssuredPartners' in-house ERISA counsel works with you to keep your health and welfare benefit programs in compliance with all applicable government regulations.

**Initially, AssuredPartners can:**

- Review current plan documents for compliance with applicable IRS/DOL requirements
- Review current Summary Plan Description(s), Summaries of Material Modifications, plan documents, and benefit booklets for compliance with applicable DOL requirements
- Determine whether all required forms 5500 (for plans 501 and up) have been appropriately filed
- Review the most recently distributed Summary Annual Report(s)
- Determine which plans are subject to nondiscrimination testing
- Discuss various risk management strategies and best practices to ensure compliance
- Provide control group analysis for groups

Once that initial review is completed, recommendations have been made, and our solutions implemented, AssuredPartners will continue to work with your business to ensure timely updates to your plans, documents, and processes as new regulations emerge.

**Ongoing Benefits Compliance services consist of:**

- Preparing all required SPDs, Plan documents, and amendments
- Preparing all required forms 5500 (plans 501 and up) including supporting Schedules
- Preparing all required Summary Annual Report(s) for distribution to employees
- Completing nondiscrimination testing as necessary
- Providing ongoing consulting services when you have technical questions about your plan
- Informing you of legislative changes through newsletters and client seminars
- Assisting with questions relating to COBRA compliance, HIPAA compliance, FMLA-integration with your H&W plans, ERISA compliance, ACA, and IRC Sections 79, 105, 125 and 129
- Provide an interactive timeline for your annual compliance calendar to-do tasks, ensuring compliance and fine avoidance

Please contact us to learn more about how we can handle keeping your business in compliance with all these government regulations.