

## Make sure your benefits plans pass the test with ERISAEdge

TASC ERISAEdge offers over 38 years of experience in compliance management and services. With DOL audits and employee complaints on the rise, it is more important than ever to rely on an industry expert to ensure your benefits plans “pass the test” and comply with ERISA requirements.

### ERISA...It's the Law!

ERISA is a federal law that regulates Group-sponsored benefits (also called “welfare benefit plans”). Besides requiring the provision of specific Plan features and funding information, the law in some cases mandates employers to submit detailed information to the government.

Employers face strict deadlines for disclosing Plan information to all eligible employees and all sponsors who administer ERISA plans must follow a strict fiduciary code of conduct.

You may be at risk and not even know it! Failure to comply with ERISA's requirements can mean costly government penalties, even employee lawsuits. Let ERISAEdge take care of all the necessary documents, forms, and record keeping for you.

### Why Choose ERISAEdge?

- Offers 75+ years of combined industry experience and sustainability.
- Offers flexible Plan design – maintains separate ERISA Plans or bundle different benefits into a single Plan.
- Assisted multiple Clients with closing an audit.
- Offers more than just document-generating software; services come with industry experts and in-house legal counsel for assistance in preparing documents accurately.
- Offers **Hold-Harmless Agreement** of up to one million dollars if we make an error that results in a Client being penalized.
- Offers robust services, all performed in-house.
- Offers **free PCORI services** to ERISAEdge clients.
- Maintains excellent track record of outstanding customer support (in-house) and Client access to ERISA professionals.
- Conducts **free monthly Webinars** on ERISA/FMLA/ COBRA compliance, and offers free on-site Seminars to national Brokers and Clients upon request.

### ERISAEdge Services

- Document Preparation:
  - Plan Document and Summary Plan Description (SPD) known as a wrap Plan or mega-wrap Plan.
  - Form 5500 and associated Schedule A or C, and provides secure software for employer to upload to DOL.
  - Summary Annual Report (SAR).
  - Summary of Material Modification (SMM), if needed.
- Prepares required ERISA and Healthcare Reform Notices for eligible employees (if elected).
- Monitors the ERISA Plan and the associated employee benefits to ensure timely disclosure of Plan changes to employees.
- Monitors legislative and regulatory changes, ensuring the Plan is up-to-date.
- Provides amendments due to regulatory updates automatically to clients.
- Maintains all required records for the mandated amount of time.
- Provides instruction regarding required on-site record keeping.
- Provides guidelines for disclosing required information to employees.
- Assistance in the event that employee benefit plans are reviewed by the DOL.
- Self-Insured Health Plan Discrimination Testing.

#### Stand-Alone Compliance Service Options:

- PCORI Services
- Form 5500 Preparation
- Non-Discrimination Testing