

## Wrap Plan Solutions

	— (Consultative) — Platinum Package	Gold Package	— (Online) — <b>Wrap-Tight<sup>SM</sup></b>
• Review of Master Service Agreements, insurance contracts and certificates by Consultant	✓		
• Review and identification of document discrepancies compared to compliance regulations and employer's administrative practice	✓		
• Searchable master PDF of Wrap Plan/SPD, along with insurance documents required for distribution	✓		
• Extensive telephone consultation with client and/or broker/agent	✓	✓	
• Communication with client and/or broker/agent to review plan documents, answer questions and discuss distribution requirements	✓	✓	
• Access to Consultant for duration of Plan Year	✓	✓	
• Creation of Plan Amendments and Summary of Material Modifications (SMM) during Plan Year	✓	✓	
• Audit support on any DOL Wrap Plan audit	✓	✓	
• Long-term access to all Wrap documents via web-based file sharing site	✓	✓	
• Preparation of Wrap Plan document, aggregating all ERISA benefits into one document	✓	✓	✓
• Preparation of Summary Plan Description (SPD) that aligns to Wrap Plan	✓	✓	✓
• Qualified Medical Child Support Order (QMCSO) administrative procedure instructions	✓	✓	✓
• Digital copies (PDF) of Wrap Plan and SPD	✓	✓	✓
• Department of Labor (DOL) Safe Harbor electronic distribution instructions	✓	✓	✓
• Archive storage of plan documents	✓	✓	✓
• Federal Model Notice package	✓	✓	✓
• Compliance for the Plan Year	✓	✓	✓
• Annual legislative and compliance updates	✓	✓	✓
• Flat-fee pricing in lieu of hourly rates	✓	✓	✓
• Subsequent renewal subscription offered at reduced investment	✓	✓	✓

## Form 5500 Preparation

• Simple and efficient filing process to meet deadlines
• Pre-filled plan worksheets in alignment with ERISAPros Plan document or prior 5500 filing
• Extensive two-tiered internal review process to ensure accuracy
• Prompt turnaround on modifications/corrections prior to filing
• Experienced Health & Welfare team to answer technical questions
• Preparation of Form 5500 and Schedule A's
• Prepare Amended 5500 filings
• Summary Annual Report included
• DOL Filing acknowledgment provided immediately
• E-file on behalf of Employer
• Automatic Extension (Form 5558) filed on behalf of engaged clients
• Delinquent Filing review and assessment
• Full-service Delinquent Filer Voluntary Compliance Program (DFVCP) submission

## Premium-Only Plan (POP) Document

• Consultative interview for plan preparation
• Alignment with Wrap Plan documents prepared with ERISAPros consultative or online solution
• POP Plan document
• POP Summary Program Description
• Ancillary premium conversion form available (brand customizable)
• Flexible plan options available, including HSA and opt-in/opt-out features