

Form 5500/5500-SF Preparation

Includes:

- * Preparation of Form 5500/5500-SF
- * Preparation of required Schedules A, C & H as applicable
- * Preparation of Summary Annual Report
- * Secure access to proprietary e-signing portal and online form archive

Plan Document Preparation

Wrap & Cafeteria Plan documents include:

- * Preparation of plan document
- * Preparation of Summary Plan Description

Premium-Only-Plan documents include:

- * Preparation of custom adoption agreement
- * Basic Plan Document
- * Preparation of Summary Plan Description
- * Consent and adoption resolutions agreement

Plan amendments include:

- * Preparation of plan amendment
- * Preparation of Summary of Material Modifications
- * Consent and adoption resolutions agreement

Nondiscrimination Testing

- * IRC §105(h) group medical, FSA, HSA and or HRA plan(s)
- * IRC §125 Cafeteria Plan tests
- * IRC §129 Dependent FSA plan tests