

## SERVICES & SUPPORT

- Plan Set Up:** Includes: Plan document, summary plan description, board resolution, service agreement, business associate agreement & plan forms.
- Annual:** Compliance testing, 5500 tax forms and regulatory amendments as needed.
- On-Going:** Employee presentations and practical training for day-to-day administration.  
Month-to-month administrative support tailored to your needs and specific type of plan.  
Same or next day response.  
Optional benefit card for eligible plans.  
\*Mandatory restatements every 6 years.

## FEES-ONE TIME

### Plan Setup & Documents:

Premium Only Cafeteria Plan (POP)	\$450
Full Cafeteria Plan (FSA/DCA/HSA)	\$500
Health Reimbursement Arrangement (HRA)/QSEHRA	\$550
ICHRA	\$700
Transportation Plan	\$200
Wrap Plan Docs	\$500

### Additional Per Event:

Amend & Restate Existing Document	\$300
Plan Document Amendment	\$200

## FEES-ANNUAL

<b>Premium Only Cafeteria Plan Annual Renewal Fee</b> Discrimination testing & open enrollment forms	\$250 annual renewal fee
<b>Full Cafeteria Plan Annual Renewal Fee</b> Discrimination testing, open enrollment forms, 5500 tax form if required * Fee is based on 1 1/2 times the monthly administration fee	\$10PEPY (\$100 minimum; \$400 maximum)
<b>Health Reimbursement Arrangement Annual Renewal Fee</b> Utilization reports, SBC's, PCORI preparation, 5500 tax form if required	\$150 annual renewal
<b>5500 Tax Form, if needed</b>	\$250
<b>Wrap Docs Filing</b>	\$750
<b>ICHRA</b>	\$200

## FEES-MONTHLY

<b>Full Cafeteria, Transportation, Lifestyle &amp; Some HRA Plans</b>	
Monthly Minimum	\$65 per month
Per Person	\$5.50 per plan participant
Bank Account Maintenance Fee	\$10 per month (stop pay and ACH reject fees will be passed through to client or participant)
<b>Health Savings Account (HSA)</b>	
Monthly Minimum	\$30 per month
Per Person	\$3 per month
<b>Health Reimbursement Arrangement (HRA)</b>	
1st dollar HRA & QSEHRA	Same as Full Cafeteria Plan (See Above)
Deductible HRA	\$5.50 per plan participant
-Monthly minimum	\$65 per month

## FEES-ADDITIONAL WORK

<b>Enrollment Meetings (no longer than 4 hours)</b>	
-Online	\$300
-In person (within 1 hour of PBS)	\$500
<b>Any additional required or requested services not specifically listed above.</b>	\$100 per hour

### 2025 Fee Schedule