

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
Termination	\$300

FEES-ANNUAL

Premium Only Cafeteria Plan Annual Renewal Fee Discrimination testing & open enrollment forms	\$250 annual renewal fee
Full Cafeteria & 1st dollar HRA Plan Annual Renewal Fee 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)
Health Reimbursement Arrangement (deductible) Annual Renewal Fee Utilization reports, SBC's, PCORI preparation, 5500 tax form if required	\$150 annual renewal
Wrap Docs 5500 Filing	\$750
ICHRA	\$200

FEES-MONTHLY

Full Cafeteria, 1st Dollar HRA, QSEHRA, Transportation & Lifestyle Plans	
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)
Health Savings Account (HSA)	
Monthly Minimum	\$30 per month
Per Person	\$3 per month
Deductible Health Reimbursement Arrangement (HRA)	
Deductible HRA	\$5.50 per plan participant
Monthly minimum	\$35 per month

FEES-ADDITIONAL WORK

Enrollment Meetings (no longer than 4 hours) & Benefit Fairs	
-Online	Free/Included
-In person (within 1 hour of PBS)	\$500
Any additional required or requested services not specifically listed above.	\$100 per hour

2025 Fee Schedule