

Compliance Services



Brokers and Employers

Our expertise runs deep in everything we do.
Dot your i's and cross your t's.



Our à la cart **Compliance Services** include Wrap Plan Documents, Form 5500, and Nondiscrimination Testing for Cafeteria Plans.



Wrap Plan Documents

The simplest way to comply with ERISA requirements is a Wrap Plan Document, which “wraps” health and welfare benefits into a single plan document and Summary Plan Description (SPD). It also eliminates the need to submit multiple Form 5500s. We stand behind our Wrap Plan Documents and provide a guarantee they will meet ERISA requirements in the event of a Department of Labor audit.



Form 5500 Filing

Trust our compliance expertise and accuracy to prepare your Health and Welfare Benefit Plan Form 5500s through a single, experienced source. We prepare Form 5500s at no additional cost for BESTflex Plan clients who use our Health Care FSA administration. And we prepare Form 5500s for other clients for an additional fee.



Nondiscrimination Testing

Employers are required to demonstrate to the IRS that their **Section 125 Cafeteria Plan** and its component benefits do not discriminate in favor of highly compensated or key employees. Plans out of compliance can face adverse tax consequences. We include nine nondiscrimination tests per plan for BESTflex Plan clients at no additional charge. And we perform Nondiscrimination Testing Services for other clients for a fee.



Engaged Consultation

Our compliance interactions with employers are engaged and personal—not just check-the-box online interactions. Employers work with their dedicated Client Service Consultant and our compliance team is readily available to help with research and resolution.

See how we're *different.*



Compliance *Expertise*



Dedicated *Support*



100% *Employee-owned*

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