



ERISAEdge Required Information

Welcome to ERISAEdge!

Now that you have submitted your application, TASC requires additional information to ensure your ERISA compliance. Please take a moment and review the additional information that will be necessary for ERISAEdge to begin this process.

It will be necessary that you have gathered and provided any applicable information/materials listed below. Information must be submitted electronically to ERISAEdge@tasconline.com within **two weeks** of your ERISAEdge Plan Application submittal.

Thank you in advance for your cooperation.

Required Materials to Provide ERISAEdge:

- 1) For all ERISA benefits listed under the ERISAEdge Benefits section of your Plan Application, please contact the applicable carriers and request electronic copies of the **EOC Evidence of Coverage / Certificates of Coverage*** for submittal.

*The Evidence of Coverage/Certificates of Coverage is required to be provided to ERISAEdge electronically within 2 weeks of the Plan Application submittal to TASC in order to ensure timely compliance.

- 2) If applicable, submit your current **ERISA Plan Document/SPD**.
- 3) If you have ever amended your plan, submit any **Summary Materials Modification's**.
- 4) If applicable, submit the last **Form 5500** filing and all schedules. Form 5500 is required if more than 100 employees participate in any welfare benefits as of the first day of the Plan Year.
- 5) If applicable, submit the last **Summary Annual Report (SAR)** prepared. A SAR is a required disclosure to employees when a 5500 is filed.
- 6) If applicable, submit the **Plan Number** for your **Section 125 or HRA** (Health Reimbursement Arrangement).

Submit all applicable items via e-mail to:

ERISAEdge@tasconline.com