



To pre-fund post-employment healthcare, look no further than TASC's Retiree Funded HRA (Retiree FHRA). We help eliminate future healthcare liability, create a hedge strategy against healthcare inflation, and foster peace of mind for participants.

The number of Medicare beneficiaries will double in next 40 years. With TASC's Retiree FHRA, you can keep the promise you made to retirees and significantly reduce your GASB 75 Other Post-Employment Benefits (OPEB) liability. The Retiree FHRA provides a customized benefits solution to better meet employee needs today and in the future. As with all of our service offerings, TASC guarantees superior outcomes and convenience—all powered by 45 years of benefits experience.

Save Money. Reduce Risk. Keep Promises.

A Retiree FHRA allows plan participants to invest, accumulate interest, and receive reimbursements during their retirement, all **tax-free**. For example, a Participant who receives \$1,000 a year in a Funded HRA, could end up with \$10,000 more in 20 years than a participant with an unfunded FHRA.

How it Works

There are two phases to this program. The first is the “**accumulation phase**”, when participants are encouraged to review and invest their account balances to maximize their earning potential. The next phase is “**retirement**,” when participants draw on their Retiree FHRA assets to pay for uninsured, out-of-pocket medical, dental and vision expenses and insurance premiums.

A TASC Retiree FHRA is an essential element of successful retirement planning that should not be overlooked.

Help your employees enjoy tax-free healthcare dollars to save and spend for their post-employment healthcare needs.

Employer Benefits

- Establishes trust account, Plan Document creation and maintenance.
- Provides choice of VEBA or Section 115 trust.
- Files IRS Form 1024 and annual Form 990 returns.
- Handles daily-valued investment recordkeeping.
- Manages trust account daily valuation, trade, and transfer processing.
- Provides daily balancing, quarterly and annual reconciliation.
- Offers comprehensive communication materials and reporting package.
- Backed by the TASC audit guarantee.

Employee Benefits

- Various investment choices to suit.
- Single online platform for managing claims and investments alike.
- Online access to investment activity, performance history, account balances, reimbursement history, necessary forms, and more.
- Multiple options for submitting reimbursement requests and receiving reimbursements.
- User-friendly plan introduction, educational materials, and annual online statements.