



**SAVE OVER \$5,800 A
YEAR ON YOUR MEDICAL
EXPENSES!**



HEALTH REIMBURSEMENT ARRANGEMENT

AgriPlan® BizPlan®

AgriPlan® BizPlan®

Save Thousands Each Year!

Each year, AgriPlan, BizPlan and No Limit Plan Clients average over \$5,800 a year in savings! Key to these savings is the ability to declare medical expenses as a business expense, rather than a personal deduction.

AgriPlan and BizPlan are Health Reimbursement Arrangements (HRAs) that enable qualified small business owners to deduct federal, state, and self-employment taxes for family medical expenses. This benefit Plan is an ideal way for a farmer, an independent sales agent, a trucker, or a retail shop owner to save thousands each year!

AgriPlan and BizPlan

- **Save you money**
Enables you to deduct family medical expenses including: health insurance premiums; out-of-pocket medical, dental, and vision costs; and qualified long-term care insurance premiums.
- Gives you eligible expense guidance and an exclusive TASC Card that enables you to better manage and reduce your over-the-counter expenses.
- **Provide peace of mind**
Industry-exclusive Audit and Money Back guarantees.
- Complete compliance with ever-changing regulations.
- Ability to Carry Over any available unused medical reimbursements to the next Plan year.
- **Reduce your workload**
Provides multi-employee clients with the required Summary of Benefits Coverage to distribute to your employee(s).
- Furnishes ERISA and PPACA notices to multi-employee clients.
- Provides pre-filled IRS Tax Form 720 and PCORI guidance to multi-employee clients.

Universal Benefit Account

As your business grows and your needs change, TASC's Universal Benefit Account will grow with you. If your business has grown beyond a single employee, TASC's Universal Benefit Account may be a better fit.

Benefits should feel like benefits. Unfortunately, years of unpredictable rules and legislation have created a complex, confusing landscape of offerings from hundreds of companies. When benefits are difficult to manage, it's easy to forget that they're saving money for you and your employees.


TASC has created a simple, intuitive way to manage benefits. Its revolutionary Universal Benefit Account is designed around how people think rather than overcomplicated rules; helping you work smarter and faster.

At their core, many benefits work the same way: Money goes in, people request reimbursements, and money goes out.

When Americans have more money to spend, when they invest in their health, when they have the tools to support their families, when they give back to their communities, when they save and grow, **we all benefit.**

TASC is your true partner, helping you focus less on your benefits and more on your business.

No matter how the industry changes or needs evolve, we'll be here to listen and grow alongside you. And that's making benefits truly feel like benefits — for everyone.



BENEFITS SHOULD FEEL LIKE BENEFITS



Medical expenses with and without AgriPlan or BizPlan

Without

PREMIUM DEDUCTION* **100%**

(Health & long-term care)

\$10,207* x 100% = \$10,207

Federal tax rate

\$10,207* x 15% = \$1,531

Tax savings =

\$1,531

OUT-OF-POCKET EXPENSES **0%**

(Out-of-pocket medical)

\$6,390* x 0% = \$0

Federal and state tax savings, 0%

\$0

TOTAL EXPENSES = \$16,597

TOTAL DEDUCTION = \$10,207

Total Tax Savings \$1,531

With AgriPlan or BizPlan

PREMIUM DEDUCTION* **100%**

(Health & long-term care)

\$10,207* x 100% = \$10,207

Federal, state and SE tax rate

\$10,207* x 35% = \$3,572

Tax savings =

\$3,572

OUT-OF-POCKET EXPENSES **100%**

(Out-of-pocket medical)

\$6,390* x 100% = \$6,390

Federal, state and SE tax rate

\$6,390* x 35% = \$2,236

TOTAL EXPENSES = \$16,597

TOTAL DEDUCTION = \$16,597

Total Tax Savings \$5,809

*These figures are based on actual average AgriPlan and BizPlan Client premiums, out-of-pocket medical expenses, and tax savings!



How much could you save?

Employer Name _____ Contact Name _____
 Company Name _____
 E-mail _____
 Company Mailing Address _____
 City _____ State _____ Zip _____
 Phone Number _____ Best Time To Call _____

Tax Filing Status: C-Corporation S-Corporation Partnership Sole Proprietor
 Non-Profit LLC Other _____

Insurance Policy: Group Individual None Carrier _____

Are you currently married? Yes No

If you answered Yes, does your spouse assist you in your business? (answering phones, website design, bookkeeping, delivery, etc.)? Yes No

Do you currently have any unrelated employees in your business? Yes No

If you answered Yes ...

How many work more than 25 hours per week? _____
 How many complete more than 7 months of employment annually? _____
 How many are over age 25? _____

Approximately how much do you spend annually on the following medical expenses?

Health Insurance Premiums \$ _____
 (include any accident, hospital indemnity, cancer, vision and dental insurance etc.)
 Long-Term Care Premiums \$ _____
 Out-of-Pocket Medical Expenses \$ _____
 (include prescription drugs, co-pays, deductibles etc.)
 Vision (include contact lenses, glasses, eye exams, etc.) \$ _____
 Dental (include routine cleanings, exams, etc.) \$ _____

TOTAL \$ _____

Provider Name/Phone _____ Provider # _____
 Retail/Wholesale/Coupon Code _____
 Employer (sign here) _____
 Title _____
 Date _____

Mail, e-mail or fax this completed form to your TASC Provider or Regional Representative for a FREE savings analysis!