



## WHY TASC

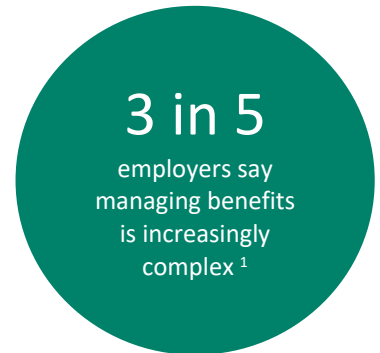
### It started with a desire to help a friend.

Total Administrative Services Corporation (TASC) was founded on a simple belief: regular people should be able to receive the same tax advantages as large corporations.

In the process, we brought simplicity to one of the most complicated systems in the world: the US tax code. The solution worked so well, we continued to invent products that transformed the lives of farmers and other entrepreneurs, their families, and their communities. And we're still in the life-changing business for employers of all sizes, in all markets, today.

After more than 45 years in the benefit administration industry, our conviction is stronger than ever. We've discovered a new way to remove complexity, a new way to help Americans pay less tax and invest more in their health and prosperity.

We are committed to understanding our clients' needs and ambitions and will configure a solution, whether they have one employee or one million. Because 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.**



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### TASC at a glance:

- » **72,000 clients** across the United States
- » **\$2.7 billion** in funds handled each year
- » **\$30 billion** saved in taxes by TASC clients and participants
- » **\$1.6 million** donated to charity by TASC and its employees in last year
- » **94% of clients** feel their customer service representative handled their call with courtesy and professionalism

<sup>1</sup> Guardian Workplace Benefits Study – 5<sup>th</sup> Annual; May 2018

## TASC PCORI OVERVIEW

The **Patient-Centered Outcomes Research Institute (PCORI)** is charged with examining the outcomes, effectiveness, and appropriateness of different medical treatments. PCORI evaluates existing studies and conducts its own, with funding paid in part by employers who sponsor Health Reimbursement Arrangements.

***TASC PCORI makes calculating and paying this fee easy.***

We also help you decipher the confusion of this federal requirement. The fee to fund PCORI will be imposed on employers and insurance carriers with fee amounts expected to change annually. In addition to meeting the annual July 31 PCORI fee deadline, employers must determine exactly which employees are affected. And while these evolving complexities are currently set to affect employers with Plan years ending 2012 through 2029, this time frame may change as well.

## COMPLIANCE SERVICES

TASC offers years of employee benefits experience supported by industry, governmental, and compliance experts to ensure all aspects of compliance for your employee benefits plans. The following items are included as part of your PCORI Compliance Management:

- ✓ Client Administration Manual
- ✓ PCORI fee calculations
- ✓ Access to experienced professionals and customer support
- ✓ Client communications

### Client Communications:

- **TASC Tracker Client Blog** for TASC news and service updates  
[www.tasctracker.com](http://www.tasctracker.com)
- **Capital Connection Blog** for regulatory and legislative news/updates  
[www.tasccapitalconnection.com](http://www.tasccapitalconnection.com)

## TASC PCORI PRICING

<b>Total Employee Count:</b>	
<b>Plan Start Date:</b>	
Stand-alone PCORI will start on 07/01 of the purchasing year. <i>Example: 2020 PCORI due on 7/31/2021 would start 07/01/2020.</i> Please enter the year in which you would like reporting to start.	

- ✓ PCORI services are waived for TASC ERISA clients.
- ✓ Pricing is based on the total average number of employees covered.
- ✓ Pricing assumes the Client has one or more self-insured plans.

Annual Administration Fee	\$
<i>Includes:</i> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> PCORI fee calculations.</li> <li><input checked="" type="checkbox"/> Timely and accurate tax filing guidance.</li> <li><input checked="" type="checkbox"/> TASC PCORI Administration Manual.</li> <li><input checked="" type="checkbox"/> Access to experienced professionals and customer support.</li> <li><input checked="" type="checkbox"/> Client communications.</li> </ul>	

### TERMS

Plan Applications must be submitted with full payment of all applicable fees listed above.

### GUARANTEES

The pricing presented in this proposal is guaranteed for 90 days.

*Any and all information in this TASC proposal is confidential and can be used for the sole purpose of placing a client with TASC. Any disclosure of this information to any other third party is a breach of the TASC Provider Agreement(s) and will cause losses to TASC. TASC will immediately terminate any agreement with any person who discloses the information to an unauthorized third person and seek immediate reimbursement for any loss attributable to the disclosure.*