

WRAP PLAN DOCUMENT PROCESS

Here are step-by-step instructions for preparing a wrap plan document with ABV:

Step 1: Provide select information to ABV for the Discovery Process

Information needed during the Discovery Process includes: number of ERISA welfare benefit plans, plan/policy year dates, carrier/TPA information, eligibility provisions, etc. The Discovery Process includes conference call with Client/Advisor to discuss issues and details of project.

Step 2: Receive Engagement Letter and fee estimate from ABV

Sign and return.

Step 3: ABV creates Plan Summary (PS) worksheet and submits for review

The Plan Summary worksheet is the data intake worksheet for all pertinent plan information that is necessary for preparation of the wrap plan document.

Step 4: Client and/or Advisor confirms complete PS worksheet

Step 5: ABV prepares all plan documentation and complete internal review process

Step 6: ABV delivers wrap plan document, wrap summary plan description, corporate resolution, explanatory cover letter to Client/Advisor via email

WRAP PLAN DOCUMENT PROCESS

Step 7: ABV sends invoice to Client/Advisor

Step 8: Client submits payment

Advice. Strong employee benefits domain expertise.
Benefits. Automated, comprehensive compliance tools.
Vision. Anticipate and consult.

Contact ABV

o: 1.855.5500.ABV

c: 317.607.0946

e: anne@abvadvisors.com

11495 N. Pennsylvania St., Ste. 140

Carmel, IN 46032

www.abvadvisors.com