

## Third Party Administrator

01. What types of plans does the **Applicant** provide third-party administrator (TPA) services for?

Life, accident, health, and disability plans

Multi-employer benefit plans (Taft Hartley trusts, MEWAS, METS)

Pension and/or retirement plans

Preferred Provider Organization, Health Maintenance Organization, or other managed care program

Property and casualty actuary

Workers compensation

Other

If other, please provide details.

02. Do the **Applicant's** services include any of the following?

- Administration of COBRA benefits
- Benefit plan design
- Investment management of plan funds (other than selection of a third-party vendor)
- Placement of reinsurance/stop loss coverage
- Plan trustee services
- Utilization review

Yes

No

03. Does the **Applicant** maintain fidelity insurance?

Yes

No

04. When performing services as a fiduciary, does the **Applicant** have written procedures in force to ensure plans administered by the applicant comply with ERISA?

Yes

No

Does not perform services as a fiduciary