

MONEYWISE SOLUTIONS

August 1, 2014

To:

From: Frank Surface Return to FSurface@MoneyWiseSolutions.com

Re: FLEX Setup Info Request

Company Name
Address
City, State Zip
Plan Administrator
Title
Phone
Federal ID Number
Plan Year
Waiting Period
Medical Limit?
Payroll Cycle
1st payday in Plan Year
Member Essentials For Each Participant (S Corps – no HCE's)
Name
Address
SSN
Sex
DOH
Key Employee
Pay Cycle
Premium Amounts