



MoneyWise Solutions

Your Comprehensive Compliance Administrator.



THE MONEYWISE ADVANTAGE

- ✓ One Stop Resource for all your Compliance Needs
- ✓ Expert Guidance
- ✓ Saving you Time and Potential Penalties
- ✓ Dedicated Account Team

WHY CHOOSE US?

We are dedicated to delivering high-quality and cost-effective benefit solutions, accompanied by world-class customer service. Additionally, we continuously adapt our portfolio to meet the evolving needs of our clients.

CONTACT US



KEEPING YOU IN COMPLIANCE

Staying on top of the constantly evolving compliance regulations surrounding employee benefits can be a daunting task. Neglecting this responsibility could result in costly penalties. Let MoneyWise alleviate this burden for you.



ERISA COMPLIANCE

- Premium Only Plan (POP) Documents
- Wrap Document
- 5500 Preparation & Filing
- Benefit Notices



NON-DISCRIMINATION TESTING PACKAGE

- Required Annual Tests for Section 125 and 105 Plans
 - Eligibility Test
 - Benefit Test
 - Key Employee Concentration Test
- Results include failure recommendations



SIMPLIFIED FEES

- POP Plan Document \$100**
- Wrap Document \$200**
- 5500 Prep & Filing \$600**
- Non-Discrimination Testing \$600**
Per Testing Package (3 Available)
- Benefit Notice Package \$5 /Letter**



MoneyWiseSolutions.com



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