

Plan Document Solutions, Inc.

✦ *Offering simple solutions to all of your plan document needs!* ✦

P.O. Box 275
Daisytown, PA 15427

Plan Document Solutions, Inc. is a company that specializes solely in Plan Documents. We have three separate pricing structures available for our clients. We have done everything that we can to ensure that you are receiving savings when you choose to use us as your plan document service provider.

We worked with TPAs and attorneys when developing these documents. Protection of the plan sponsor, elimination of stop loss claim issues, and defense of the plan provisions were some of the things that we based the development of these documents on.

Included are standard templates with library options from which you can choose the best language to suit your needs. The libraries have the most common options that TPAs are using today. Modification of our documents is quite simple, and each Microsoft Word document can be customized to fit your individual clients.

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License Agreement

When you license your documents with us, you will receive the best pricing and payment options, while receiving stellar service and discounts.

The ongoing License Agreement includes the document templates, library options, instructions for use, updates (as they become available or necessary), and four hours per month of clerical and formatting support. There is a minimum two-year license requirement. If you are interested in licensing more than one, but not all of our plans, please contact us for customized pricing.

We have two different types of medical templates available: a detailed plan and a condensed plan. Our detailed plan offers more benefit options for you and your clients to choose from, while our condensed plan is more simplified with shorter checklists and most of the standard options already included. The pricing structure is as follows:

<u>Document</u>	<u>Detailed Plan Monthly Pricing</u>	<u>Condensed Plan Monthly Pricing</u>
Medical, Dental, Disability, Rx, Vision	\$650	\$550
Medical, Dental	\$600	\$500
Medical, Rx	\$600	\$500
Medical, Vision	\$600	\$500
Medical Only	\$450	\$350
Dental Only	\$300	\$200
Disability Only	\$300	\$200
Rx Only	\$300	\$200
Vision Only	\$300	\$200
All of the above medical documents	\$850	\$650
Medical FSA, Dependent Care FSA & POP	\$350	\$350
Medical FSA & Dependent Care FSA	\$250	\$250
Dependent Care FSA	\$150	\$150
Medical FSA	\$150	\$150
Premium Only Plan (POP)	\$150	\$150
All of the above flex documents	\$500	\$500
All of the above medical and flex documents	\$1,200	\$1,000

In addition to the above plans, we also offer the following documents, which are available in only one format only. The pricing structure is as follows:

<u>Document</u>	<u>Monthly Pricing</u>
Chiropractic, Acupuncture, Massage Therapy (CAM)	\$300
Health Reimbursement Arrangement (HRA)	\$150
Health Savings Account (HSA)	\$150
Medical Reimbursement Plan (MRP)	\$150
Adoption Assistance Plan	\$150
Transportation Plan	\$100
Medical Wrap	\$100
Dental Wrap	\$100
Vision Wrap	\$100
Group Life Wrap	\$100
Short Term Disability Wrap	\$100
Long Term Disability Wrap	\$100

The above multi-license discounts are some of the most common license packages that we offer. However, customized pricing packages are available for any combination of our plans, and you can mix any of our plans into a monthly license to obtain your desired group of documents.

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One-Time Template Purchase

We also offer a one-time purchase option where you can purchase our document templates for in-house use.

The One-Time Template Purchase includes the document templates, library options, and instructions for use. Updates, as they become available or necessary, will be offered to you at a flat-fee. Any clerical and/or formatting support will also be billable charges.

If you are interested in purchasing more than one, but not all of our plans, please contact us for customized pricing. The pricing structure is as follows:

<u>Document</u>	<u>Detailed Plan Purchase Price</u>	<u>Condensed Plan Purchase Price</u>
Medical, Dental, Disability, Rx, Vision	\$8,000.....	\$7,000
Medical, Dental	\$6,000.....	\$6,000
Medical, Rx	\$6,000.....	\$5,500
Medical Only	\$5,000.....	\$4,500
Dental Only.....	\$3,850.....	\$3,500
Disability Only	\$3,850.....	\$3,500
Rx Only.....	\$3,850.....	\$3,500
Vision Only.....	\$3,850.....	\$3,500
All of the above medical documents	\$12,000	\$10,000
Medical FSA, Dependent Care FSA, & POP.....	\$4,800.....	\$4,800
Medical FSA & Dependent Care FSA	\$3,250.....	\$3,250
Dependent Care FSA	\$2,000.....	\$2,000
Medical FSA.....	\$2,000.....	\$2,000
Premium Only Plan (POP)	\$2,000.....	\$2,000
All of the above flex documents	\$4,250	\$4,250
All of the above medical and flex documents	\$15,000	\$13,500

In addition to the above plans, we also offer the following documents, which are available in only one format only. The pricing structure is as follows:

<u>Document</u>	<u>Purchase Price</u>
Chiropractic, Acupuncture, Massage Therapy (CAM)	\$3,850
Health Reimbursement Arrangement (HRA)	\$2,000
Health Savings Account (HSA)	\$2,000
Medical Reimbursement Plan (MRP)	\$2,000
Adoption Assistance Plan.....	\$2,000
Transportation Plan	\$1,500
Medical Wrap.....	\$1,500
Dental Wrap	\$1,500
Vision Wrap.....	\$1,500
Group Life Wrap	\$1,500
Long Term Disability Wrap	\$1,500
Short Term Disability Wrap	\$1,500

The multi-purchase discounts listed above are some of the most common purchase packages that we offer. However, customized pricing packages are available for any combination of our plans, and you can mix any of our plans into a purchase package price to obtain your desired group of documents.

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Preparation Only Services

For those wishing to outsource their document preparation, Plan Document Solutions, Inc. provides preparation only services, which allow you the flexibility of customizing your documents, without having to purchase or license our document templates.

Plan Document Solutions, Inc. Preparation Only Services includes document preparation services from a checklist that you complete and forward to us. Document preparation turn-around time is ten business days for medical documents and five business days for flex documents.

The pricing structure is as follows:

<u>Document</u>	<u>Detailed Plan Preparation Price</u>	<u>Condensed Plan Preparation Price</u>
Medical +4	\$900	\$800
Medical +3	\$800	\$750
Medical +2	\$750	\$700
Medical +1	\$700	\$650
Medical Only	\$650	\$600
Dental Only	\$450	\$400
Disability Only	\$450	\$400
Rx Only	\$450	\$400
Vision Only	\$450	\$400

In addition to the above plans, we also offer the following documents, which are available in only one format only. The pricing structure is as follows:

<u>Document</u>	<u>Preparation Price</u>
Dependent Care FSA	\$250
Medical FSA	\$250
Premium Only Plan (POP)	\$250
Health Reimbursement Arrangement (HRA)	\$250
Health Savings Account (HSA)	\$250
Chiropractic, Acupuncture, Massage Therapy (CAM)	\$450
Medical FSA, Dependent Care FSA & POP	\$600
Medical FSA & Dependent Care FSA	\$400
Medical Reimbursement Plan (MRP)	\$250
Adoption Assistance Plan	\$250
Transportation Plan	\$200
Medical Wrap	\$200
Dental Wrap	\$200
Vision Wrap	\$200
Group Life Wrap	\$200
Long Term Disability Wrap	\$200
Short Term Disability Wrap	\$200

We look forward to the opportunity to discuss these options with you further. Please contact either Melissa or Chrissy for any additional information.

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