



**Internal Use Only:**

Renewal Date: January 1, 2019

Group Number: 10189  
(6 digit unique employer identifier)

Group Billing:  Manual  ACH  
Note: If newly electing ACH a new Authorization Agreement will need to be completed.

Renewal Fee: \_\_\_\_\_ Monthly Fee: \_\_\_\_\_

Rate Guarantee: \_\_\_\_\_

**The Taben Group: TabenFlex Cafeteria Plan Renewal Guide**

**Company Information**

Company Legal Name: City of Lee's Summit, Missouri  
 \*(Sponsoring Employer)

EIN/TIN: 44-6000208

Open Enrollment for eligible employees will be: From: 10/15/18 Until: 11/2/18

Type of Enrollment:  Taben Specified Spreadsheet  Online  Consumer Data Exchange

Note: For online enrollment the Taben Group must be provided with profile data for all eligible employees before Online Enrollment may begin.

**Payroll (required)**

First Payroll Date(s) of the Year: BW26-1/3/19, MO-1/18/19

Payroll Holidays: Attach a copy of your plan year payroll holidays/calendar to ensure contributions are processed according to your payroll dates for the plan year.

**POP Plan Details**

No changes to the Premium Only Plan benefits

(Check only those products that are being added as new for this renewal year)

- Health Insurance Premiums  Dental Insurance  Vision Care Insurance
- Critical Illness  HSA Contributions
- Cancer Insurance  Group Term Life Insurance (up to \$50,000)
- Disability Insurance (Not recommended)

**Premium Only Plan Benefits**  
(select health and other coverages for POP)

Note: Insurance products with a return-of-premium feature cannot be paid for on a pre-tax basis.

Employees must be \_\_\_\_\_ years of age to be eligible.

Classes	Waiting Period	Plan Eligibility <small>Indicate which plan(s) the class is ineligible for, if any.</small>	Minimum Hours	Effective Date <small>First Day Following or First of the Month or First Day of Plan Year</small>	Required Enrollment in:
	days				
	days				
	days				

**FSA Plan Details**

No changes to the FSA Plan Components

List all co-pays associated with other plans offered:

Dental	\$	Pharmacy	\$
Group Health	\$	Vision	\$

Grace Period?  Yes  No  If no, would you like to allow for a carryover?  Yes  No

Carryover Amount:  IRS Annual Limit  Other: \$ \_\_\_\_\_

*Note: The carryover option is limited to \$500.00 and applies only to the Medical FSA (not to the DC FSA)*

Grace Period Applies to the Following Plan Components:

Medical FSA  Dependent Care FSA

Change FSA Maximum Contribution: \$ \_\_\_\_\_

**FSA Eligibility**

No changes to the FSA Plan Eligibility *(If changes apply please only complete applicable changes)*

Employees must be \_\_\_\_\_ years of age to be eligible.

Classes	Waiting Period	Plan Eligibility <i>Indicate which plan(s) the class is ineligible for, if any</i>	Minimum Hours	Effective Date <i>First Day Following or First of the Month or First Day of Plan Year</i>	Required Enrollment in:
	days				
	days				
	days				

Notes: Add - City of Lee's Summit wants to amend the plan effective October 1, 2018 to prohibit the rollover from automatically occurring unless the member makes an active 2019 Health FSA election. (Active Election Amendment).

I confirm that all necessary information concerning employees and their dependents participating in the Plan and any changes to that participation, such as termination or elections, shall be furnished to The Taben Group in a timely manner. I further understand that The Taben Group and its affiliates will rely solely on information provided by the employer in designing the Cafeteria Plan and subsequent benefits administration.

I confirm that claims will be paid from the general assets of the sponsoring and/or related employers listed in this Plan Design Guide.

I certify that I have read and understand the information requested within this application, and that all information provided herein is true and accurate to the best of my knowledge. I further certify that I am authorized to establish a benefits plan on behalf of the employer.

Printed Name:

---

Signature:

Date:

---

*\*Signer should be the employer or its designee. The Taben Group or its affiliates will provide sample documents, but will not be the Plan Administrator.*