



Agent Bulletin

*Allied National - The Small Group Benefit Experts
for groups of two or more*

June 2024

Self-Service Site

Agent Edge

Member Resources



What to Know This Month

1. Individual Advantage Webinar Postponed
2. Learn About the new SureCare STM Plan
3. Reminder: 5500 and PCORI Due in July
4. Pivot Health Batter Up Bonus
5. Holiday Hours

Individual Advantage Webinar Postponed

Thank you for your interest in our new insured and non-insured Individual Advantage Plans. Unfortunately, we will need to postpone our Tuesday, June 18 webinar.

We'll send an invite when a new date has been chosen. In the meantime, if you'd like to learn more about Individual Advantage, please click the image on the right for product flyers.



Learn About the New SureCare STM Plan

Allied National is proud to market the newest Pivot Health product - SureCare Short-Term Medical (STM) Insurance

Plan. **Join us 10 a.m. (CST) Tuesday, June 25 for a webinar** on this product with Todd Greene, Pivot Health Broker Account Executive, and Liz Cissner, Allied National Senior Account Executive.

SureCare is underwritten by Pan-American Life Insurance Company. This flexible short-term medical expense plan offers members unlimited doctor office visits, zero copays for hospitalization and waives deductible requirements for select routine health screenings and more.

There are no PPO requirements. All licensed medical providers are accepted.



These plans also are designed to give members access to helpful resources through Pivot Health's patient advocacy partner, Point Health. Support includes:

- Finding the best provider to match needs and schedule appointments
- Handling the transfer of medical records to the provider
- Helping negotiate the member's responsibility on medical bills and lower out-of-pocket costs

Press the Webinar button below to register for this **10 a.m. (CST) Tuesday, June 25 webinar**. You also can learn more about the product by checking out the brochure or availability list below.

[Webinar Registration](#)

[Brochure](#)

[State Availability](#)

Reminder: 5500 and PCORI Due in July

Form 5500 Due July 31

Employers must file Form 5500 electronically with the Internal Revenue Service (IRS) and Allied National will mail your employer clients the 5500 Filing Information Worksheet. The deadline for calendar-year plans is July 31, 2024. The form is used to report information on the qualification of the plan, its financial condition, investments and the operations of the plan.



PCORI Fees Due July 31

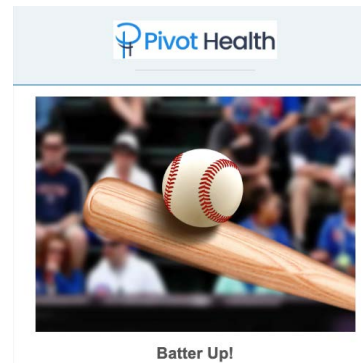
Payment of PCORI fees is due July 31, 2024. For plan years that ended on or after Oct. 1, 2023, and before Oct. 1, 2024 (including calendar year plans), the fee is \$3.22 per person covered by the plan. For plan years that ended after Oct. 1, 2022, and before Oct. 1, 2023, the fee is \$3 per person. The PCORI fee will be in effect through 2029 and is used to fund comparative effectiveness research.

To assist with both of these filings, we have a page on our website. Please refer to this page for detailed instructions on how to complete a 5500-SF filing or to learn more about PCORI.

Pivot Health Batter Up Bonus

Step up to the plate and hit it out of the park with this new bonus opportunity from Pivot Health. May 1-Aug. 30, 2024, is your chance for a grand slam. Now is the time to offer short-term plans for the longest duration possible to help take your clients the extra mile while maximizing your earnings.

Click on the image on the right for full details.



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