



ETC BROKER PARTNER TOOLS

COMPLIANCE | CONVENIENCE | STRATEGY

2023 ETC Broker Partner Pricing & Scope of Services

Broker Compliance Platform - A Flat Fee Monthly Retainer allowing Brokers/Agencies access to subject matter experts in ACA and Human Resources provided by ETC professionals either at no charge or a reduced fee, based upon individual offering. Put Compliance to work for you.	Level 1 \$500 Monthly Fee	Level 2 \$750 Monthly Fee	Level 3 \$1,000 Monthly Fee	Level 4 Custom \$\$
Managed Phone/Email Compliance, Strategy, and Best Practices Support for the Insurance Team access to ETC Team through brokerpartner@etctracking.com for general benefits and HR compliance day-to-day inquires & Broker Tools Distribution Compliance Communications, Tools	Up to 3 Producer Agents & Service Teams	Up to 5 Producer Agents & Service Teams	Up to 7 Producer Agents & Service Teams	Unlimited
Monthly Broker Tools & Communications Distribution Access - legislative updates, benefits strategies, upcoming deadlines, reminders, guidance, and tools	Included			
Access to ETC HR Secured Portal and Forms & Templates Library (Broker Access Level to MINERAL HR platform)	Included			
Annual Agency HIPAA/Hitech Webinar Training (60 minutes) focused on Business Associates and Broker HIPAA HiTech obligations and compliance	Included			
Annual Compliance Calendar, Calculators & Toolkits (updates provided throughout year as changes occur)	Included			
Discounted ACA Tracking and Reporting Services (various levels)	Included			
Pharmacy Data Collection (RxDC) Consulting Services (<i>NEW</i>)	Broker Team Training Included Client Direct Assistance and Reporting Discounted			
Agency HR Support & Employer Compliance Service Offerings (various levels)	Discounted Rates			
Discounted Employment Law Poster (employer client orders)	Included			
DOL EBSA Audit Support	One free per Year Discounted Fee thereafter	One free per Year Discounted Fee thereafter	Two free per Year Discounted Fee thereafter	Two free per Year Discounted Fee thereafter
ERISA Wrap Documents (Wrap Management for <i>all clients</i> available for custom pricing)	Reduced Pricing - 20% off of Retail			
Up to 2 Hours Agency Annual Compliance Training for Team and Clients	Included			
Invitation to ETC Exclusive Webinars and Events	Included			
Open Enrollment Materials & Employee Communication Campaigns Printed - Booklets up to 50 pages: - delivered to your meeting locations on due date. **Shipping to location extra	B&W = \$3.50 per booklet or Color = \$5.75 per booklet (direct mailing costs to be added)			
Agency dedicated Customized & Branded Compliance Email Address for Team & Clients for direct client compliance HR & Benefits Inquiries	N/A	N/A	N/A	Included
Provide Required Annual Benefits Notices (<i>customizable and in Word Doc Format</i>)	Included			
Regular ACA & HR Legal and Compliance updates, E-Blasts Weekly	Included			
PEO Financial Analysis Support & Extractions	Per Occurrence	Per Occurrence	Per Occurrence	Included
Legal Representation through Law Offices of Alicia J Haff, JD - 226J (Discounted 25% to \$300/hr.-Retail \$400/hr.)	Included			
Compliance & HR Sales Support - New Prospective Client Analysis	Up to 5 calls direct with prospective clients per calendar year	up to 6 calls with prospective clients per calendar year	up to 10 calls with prospective clients per calendar year	Unlimited
Weekly E-blast (ERISA and HR and case law) - Permission to rebrand to clients	Included			
Discounted HR Direct Support Available	Included			
Educational Data from EBIA Reference Library, BLR Comprehensive Business Solutions, and other ETC Subscription Resources	Included			
Agency Preferred pricing for Other Services	Reduced Set-Up Fees & Discounts			
Direct access to other ETC Preferred Professionals & Vendors - Referral Partners	Included for Vendor Negotiated Rates	Included for Vendor Negotiated Rates	Included for Vendor Negotiated Rates	Included for Vendor Negotiated Rates
Customizable HIPAA/Hitech Agency Security and Privacy Manuals & Resources	Reduced Pricing, available upon request			

**Travel to outside client sites or agency location invoiced at IRS mileage rate.