

*The Stalker Advantage*  
*Local Company, National Reach*  
*Outstanding Service*

Is your current broker reducing your administrative burdens so the business may focus on revenue producing activities? How many hours does your staff spend on administrative tasks related to your benefits or retirement plan?

**Group Benefits Services**

Your Broker	Stalker	
<u><b>Strategic Planning</b></u>		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pre-Renewal Meeting
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Continually Looking for Better Solutions
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Market Trend Analysis
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Cost/Benefit Analysis
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Funding Options Analysis
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Claims Analysis
<u><b>Employees</b></u>		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Open Enrollment Meetings
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Employee Benefit Summary Statements
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Your Advocate in Claims Resolution
<u><b>HR Administration</b></u>		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dedicated Support Team
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Enrollment Administration
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Universal Enrollment Forms
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Employee Benefit Surveys
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Employee Benefits Summary Booklets
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Terms / Adds / Changes
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Address Carrier Issues
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Billing Resolutions
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Email Blast on Current Issues
<u><b>Value Added Services</b></u>		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	COBRA Administration
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Wellness Programs
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Disease Management
<input type="checkbox"/>	<input checked="" type="checkbox"/>	FSA/HRA Administration
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Health Advocate
<input type="checkbox"/>	<input checked="" type="checkbox"/>	HRIS Access
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Health Care Reform Updates
<input type="checkbox"/>	<input checked="" type="checkbox"/>	HR Compliance Info

**Retirement Plan Services**

Your TPA	Stalker	
<u><b>Strategic Planning</b></u>		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Plan Design / Installment
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Market Trend Analysis
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Platform Provider Quotes
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Open Investment Choices
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Plan Docs / Amendments
<u><b>HR/Employees</b></u>		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Employee Communications
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Education Materials
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Enrollment Meetings
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Coordinate Investment Advisor Meetings
<u><b>In House Administration</b></u>		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Notices
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Record Keeping
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Terminations / Additions
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Loans / Distributions
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Qualified Domestic Relations Orders
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Rollovers
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Transfers
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Profit Sharing Calculations
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Fund Transfers / Rebalancing
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Management and Participant Reports
<u><b>Internet Access</b></u>		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Daily Valuations
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Instant Account Balances
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Monitor and Change Investment Selections Daily
<u><b>Compliance</b></u>		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Tax filings / 5500's
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Required Minimum Distributions
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Contribution Limit Monitoring
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Discrimination testing

STALKER & ASSOCIATES, INC.

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