

ERISA BONDS

The Employee Retirement Income Security Act of 1974 requires a Fidelity Bond equal to 10% of the funds of the plan handled by the Trustee/Fiduciary with a maximum limit of \$500,000.

Please complete the enclosed application and return to our office with your check payable to Hanson & Ryan Inc. ERISA Bonds are written for a three year period.



Bond Express
 770 Pennsylvania Drive, Suite 110
 Exton, PA 19341
 Telephone: (800) 873-1477
 Fax: (866) 785-2463
www.travelersagents.com

ERISA Fidelity Bond Order Form

Agency Name: HANSON & RYAN, INC. Agency Code: _____

Agency Contact: _____ Telephone #: _____

Agency Contact Email Address: _____ Fax #: 973 256 4788

Name of Plan Sponsor (*Business Name*): _____

Sponsor Address: _____

Policy Effective Date: _____

Billing Method: Agency Bill or Direct Bill Sponsor Telephone #: _____

Coverage Limits & Premiums: * Number of Trustees: _____

Bond Limit	3-Yr Prepaid Premium	Bond Limit	3-Yr Prepaid Premium	Bond Limit	3-Yr Prepaid Premium	Bond Limit	3-Yr Prepaid Premium
\$ 10,000	\$ 111	\$ 65,000	\$ 208	\$ 140,000	\$ 282	\$ 250,000	\$ 348
\$ 15,000	\$ 111	\$ 70,000	\$ 217	\$ 150,000	\$ 288	\$ 275,000	\$ 365
\$ 20,000	\$ 114	\$ 75,000	\$ 225	\$ 160,000	\$ 294	\$ 300,000	\$ 379
\$ 25,000	\$ 128	\$ 80,000	\$ 231	\$ 170,000	\$ 302	\$ 325,000	\$ 393
\$ 30,000	\$ 137	\$ 85,000	\$ 239	\$ 180,000	\$ 308	\$ 350,000	\$ 408
\$ 35,000	\$ 148	\$ 90,000	\$ 245	\$ 190,000	\$ 314	\$ 375,000	\$ 425
\$ 40,000	\$ 157	\$ 95,000	\$ 251	\$ 200,000	\$ 319	\$ 400,000	\$ 436
\$ 45,000	\$ 168	\$ 100,000	\$ 257	\$ 210,000	\$ 325	\$ 425,000	\$ 450
\$ 50,000	\$ 180	\$ 110,000	\$ 262	\$ 220,000	\$ 331	\$ 450,000	\$ 467
\$ 55,000	\$ 188	\$ 120,000	\$ 271	\$ 230,000	\$ 336	\$ 475,000	\$ 482
\$ 60,000	\$ 197	\$ 130,000	\$ 276	\$ 240,000	\$ 342	\$ 500,000	\$ 496

The Employee Retirement Income Security Act of 1974 (ERISA) requires a Plan Fidelity Bond to equal 10% of the funds handled by a Trustee/Fiduciary, with a maximum Bond Limit of \$500,000 per Plan.

Bond Limit Worksheet:			
Total Assets of Plan A:	_____	$\times .10 =$	_____ Bond Limit Plan A (<i>not to exceed \$500,000 Limit</i>)
+ Total Assets of Plan B:	_____	$\times .10 =$	_____ Bond Limit Plan B (<i>not to exceed \$500,000 Limit</i>)
+ Total Assets of Plan C:	_____	$\times .10 =$	_____ Bond Limit Plan C (<i>not to exceed \$500,000 Limit</i>)
= Limit Required:	_____ should equal the sum of the Bond Limits above (<i>Plan A + Plan B + Plan C, etc.</i>)		

Limit Requested: _____ (If this limit is greater than \$500,000, please forward to your local St. Paul Travelers Bond Underwriter.)

Loss History, if applicable: _____

Do any of the plans contain non-qualifying assets? Yes/No (If yes, please forward to your local St. Paul Travelers Bond Underwriter.)

*Note: The St. Paul Travelers ERISA Compliance Bond automatically insures all ERISA Plans of the Sponsor. The Employee Retirement Income Security Act of 1974 (ERISA) requires a Plan Fidelity Bond to equal 10% of the funds handled by a Trustee/Fiduciary, with a maximum Bond Limit of \$500,000 per Plan. The Limit of Liability for the Bond should equal the sum of the required ERISA Bond amount for each plan. The St. Paul Travelers ERISA Compliance Bond contains a unique *Inflation Guard* feature. This feature automatically provides a bond amount, per Plan, equal to that required by ERISA, provided the Sponsor/Plan purchases an amount at least equal to the required ERISA bond amount, at the Bond inception date. These rates are based on: (1) 20% commission rate, (2) 5 or fewer Trustees, (3) No losses, (4) Non-Union Plans, (5) No Non-Qualifying assets, (6) No Designated Agents or Additional Named Insured coverage, and (7) use of the St. Paul Travelers ERISA Compliance bond form. If your applicant does not meet these criteria, please contact your local St. Paul Travelers Bond underwriter.

Signature: _____ Date: _____
 (Agent or Insured)