

Group Benefits Services

Your Broker	Stalker	
<u>Strategic Planning</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>Employees</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>HR Administration</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>Value Added Services</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

The Stalker Advantage

Local Company

National Reach

Outstanding Service

How many hours does your staff spend on administrative tasks related to your employee's benefits or retirement plan?

Is your current broker reducing your administrative burdens so the business may focus on revenue producing activities?

Are the services you are offered the services you need? Is your broker willing to work with you to build a solution for your specific needs?

STALKER & ASSOCIATES

The Stocking Works • 301 South State Street • Newtown, PA 18940
• Phone: 215-860-5504 • Fax: 215.860.7044

Retirement Plan Services

Your TPA	Stalker	
<u>Strategic Planning</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>HR/Employees</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>In House Administration</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>Internet Access</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>Compliance</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

is an employee benefits consulting firm, group insurance broker and third party administrator for retirement plans.

We're here to help you build and implement a benefit strategy that attracts the right kind of people at a cost that is manageable for the company as well as your employees.

With the right health and welfare benefits for today and retirement income for tomorrow, you are one step closer to building a workforce that will be with you for the long haul.

Stalker & Associates is a regional firm, located in Newtown PA. We serve companies who are headquartered in the Northeast, although employees may be located anywhere.

We offer our clients a high touch personal service environment as well as access to technology.

As **consultants**, we focus on your specific business environment and design benefit plans that meet your employee satisfaction and business financial goals.

As independent **brokers**, we not only present you with multiple creative options from qualified carriers, we make suitable unbiased recommendations for your needs.

As retirement plan **administrators**, we provide management and participants with plan documents, reports, tax documents and compliance testing.

We look forward to earning your business.



STALKER & ASSOCIATES

***Employee and Executive Benefits
Consultants
Retirement Plan Administrators***

**301 South State Street
Newtown, PA 18940
Phone: 215-860-5504
Fax: 215.860.7044**

www.stalkerinc.com



STALKER & ASSOCIATES

Employee & Executive
Benefits

•

Consultants

•

Retirement Plan
Administrators

***“Large enough to serve you,
small enough to know you.”***