

ERISA Bond Application / Price Reference Sheet



This application should not be used for Labor Union ERISA Plans - Class Code 697.

Agency: _____ Agency Code: _____
 Plan Name: _____
 Address: _____
 Plan Assets: \$ _____ Bond Amount: \$ _____
 Effective Date: _____ Number of Trustees: _____
 Nature of Sponsor Business: _____
 Billing Options: Agency Bill Direct Bill
 Prior Carrier: _____
 Loss(es) Incurred: \$ _____
 (Past three years)

Pricing for AK, AZ, CA, CO, ID, IL, KS, MI, MN, MO, MT, NV, NM, ND, OR, SD, UT, WA, WI, and WY

Limit	3 Year Pre-Paid Premium*	3 Year Pre-Paid Premium w/ERISASHIELD**
Up to \$195,000	\$270	\$297
\$200,000	\$273	\$300
\$250,000	\$294	\$323
\$300,000	\$316	\$348
\$350,000	\$338	\$372
\$400,000	\$362	\$398
\$450,000	\$383	\$421
\$500,000	\$405	\$446

Pricing for AL, AR, CT, DC, DE, FL, GA, IN, IA, KY, LA, ME, MD, MA, MS, NE, NH, NJ, NY, NC, OH, PA, RI, SC, TN, TX, VT, VA, and WV

Limit	3 Year Pre-Paid Premium*	3 Year Pre-Paid Premium w/ERISASHIELD**
Up to \$265,000	\$270	\$297
\$275,000	\$275	\$303
\$300,000	\$286	\$315
\$350,000	\$305	\$336
\$400,000	\$324	\$356
\$450,000	\$343	\$377
\$500,000	\$365	\$402

Pricing for OKLAHOMA Only

Limit	3 Year Pre-Paid Premium*	3 Year Pre-Paid Premium w/ERISASHIELD**
Up to \$350,000	\$270	\$297
\$375,000	\$281	\$309
\$400,000	\$289	\$318
\$425,000	\$297	\$327
\$450,000	\$305	\$336
\$475,000	\$316	\$348
\$500,000	\$324	\$356

The above Premiums are for plans with 5 or fewer trustees/fiduciaries.

*Annual premium is available. Divide amount indicated by 2.7 to determine the annual premium.

**ERISASHIELD automatically increases the limit to ensure regulatory compliance.

Completed by: _____ Date _____

Please mail or fax the completed Application to The Hartford Bond Center:

The Hartford Bond Center
 200 Colonial Center Parkway
 Suite 500
 Lake Mary, FL 32746

Phone: (888) 656-0817
 FAX: (877) 257-2166