

INTEGRITY SURETY

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ERISA Fidelity Bond Application

Bond Application

Name of Plan Sponsor (business Name): _____

Sponsor Address: _____

City: _____ State: _____ Zip: _____ Limit Requested: _____

Effective Date: _____ Loss History: _____

Do any of the plans contain non-qualifying assets? Yes No

Coverages Limits & Premiums (Includes Inflation Guard)

*Please note that for this added protection, a 10% surcharge will be applied to our low ERISA bond premiums at renewal.

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

Bond Limit Worksheet:

Total Assets of Plan A: _____ x .10 = _____ Bond Limit Plan A (not to exceed \$500,000 Limit) +

Total Assets of Plan B: _____ x .10 = _____ Bond Limit Plan B (not to exceed \$500,000 Limit) +

Total Assets of Plan C: _____ x .10 = _____ Bond Limit Plan C (not to exceed \$500,000 Limit)

= Limit required: _____ should equal the sum of the Bond Limits above (Plan A + Plan B + Plan C, etc.)

*Note: The 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 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) 10% 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 Surety ERISA Compliance bond form. If your applicant does not meet these criteria, please contact your Underwriter.

Bond Order Form:

By signing below you are requesting issuance of this bond with the information provided above and agree to have Integrity Surety bill your account current or are enclosing the full premium with this application. Please note that minimum premiums will apply. Coverage is not effective until approved by a Company Underwriter.

Agent Signature: _____ date: _____