

Association Checklist



SINGLE EMPLOYER ESTABLISHMENT REQUIREMENTS

- Bona Fide Association Letter
- Board Ratification
- Trust Agreement
- Trustee Appointment
- Fiduciary Liability Coverage
- Tax ID Number
- Bank Account Established
- M1 Filing
- Form 1024 Completion
- Health Plan Document Preparation
- Summary Plan Description Preparation
- Select Audit Firm for Audit
- Form 5500