



Agent Bulletin

*Allied National - The Small Group Benefit Experts
for groups of two or more*

July 2025

[Self-Service Site](#)

[Agent Edge](#)

[Member Resources](#)



What to Know This Month

1. Idaho, Get Ready – Allied Lands in Boise August 12!
2. Form 5500 and PCORI Fees Due This Month
3. Pivot Health: A Smart Solution for College Athletes and New Hires
4. Summer Sprint Bonus is Here!

Idaho, Get Ready – Allied Lands in Boise August 12!

Join Allied National at the Simplicity Boise (formerly Insurance Network America) Annual Summit, Aug. 12–14. This premier event features top-tier training, networking and business-building sessions.

Catch Allied Benefit Consultant Randy Wehner at our booth and during his breakout session on MEC-Only Group Health Solutions – strategies that go beyond ACA compliance to bring real affordability to your clients.

Want to connect with Randy while he's in town? Call our Sales Team at 888-767-7133 to check his availability.



Form 5500 and PCORI Fees Due This Month

If your employer clients sponsor a calendar-year health plan, their **Form 5500 and PCORI fees are due this month – by July 31.**



To make this process easier, Allied National is here to help:

- We sent employers their **5500 Filing Worksheet in late May** to help them get started.
- We also created a dedicated page on our website with **step-by-step instructions** to assist them in completing **Form 5500-SF** and understanding their **PCORI fee obligations**.

PCORI Fee Rates:

- **\$3.47** per covered person (for plan years ending Oct. 1, 2024 – Sept. 30, 2025)
- **\$3.22** per covered person (for plan years ending Oct. 1, 2023 – Sept. 30, 2024)

Visit our website today for detailed filing guides and support. Don't wait – Allied is ready to assist you and your clients every step of the way.

[Guidance for Form 5500 & PCORI Web Page](#)

Pivot Health: A Smart Solution for College Athletes and New Hires

As a licensed health insurance agent, you need flexible coverage options that meet clients' individual needs – and Pivot Health plans deliver.



Student Athletes

With over **460,000 college athletes** in the U.S., many face risks like injuries or mental health challenges. Pivot Health plans offer coverage for preventive and wellness care, mental health support, physical therapy, emergency services and more. With terms ranging from 30 days to 12 months, these plans help student athletes stay focused and protected throughout their season.

New Hires

Many new employees face up to a 90-day wait for employer-sponsored benefits. Pivot Health's short-term plans fill that gap with budget-friendly coverage for doctor visits, urgent care, prescriptions and more. Choose from 3-4 multi-carrier options to meet your clients' needs while keeping them compliant as they concentrate on

settling into their new roles.

Bottom line: Pivot Health makes it easy to offer flexible, high-value coverage – whether supporting student athletes or growing workforces. Keep selling smarter and continue pivoting with confidence

Pivot Health

Pivot State Availability

Summer Sprint Bonus is Here!

Lace up and launch into action – now through Aug. 31.

With Pivot Health's Summer Sprint Bonus, agents can qualify for tiered cash bonuses based on total Pivot Health STM plans sold.



What's in it for you, your agents and clients?

Deliver unbeatable value to your clients with Pivot Health's short-term medical plans — packed with benefits, easy on the budget, and covering up to 12 months. In addition to extra cash for you and your agents.

Click on the button below for details on this great opportunity. Let's make it a summer to remember!

Summer Sprint Flyer



[View as Webpage](#)

CONNECT WITH US!



