



Agent Bulletin

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

June 2025

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What to Know This Month

1. Allied Welcomes Longtime Partner to Head our Sales Department
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Allied Welcomes Longtime Partner to Head our Sales Department

Allied National's new Head of Sales is no stranger to our company.

Robin Depenbrock, former Vice President of Sales & Marketing for Pivot Health, has worked closely with our product development and sales and marketing teams for more than five years. She worked hard to ensure our agents had the information, education and technology they needed to offer Pivot health coverage to their individual clients.

After earning a Bachelor of Science in Business Administration/Marketing from the University of Phoenix, she went on to gain more than 20 years' experience in the health care industry by working at Pivot Health and Healthplan Services.



[Sales Department goals](#)

Robin's priority at Allied is to drive growth across all sales channels with a strong emphasis on promoting Allied products and expanding our distribution network. She plans to do that by focusing on our agents' needs and making sure agents know the benefits of Allied's level-funded Funding Advantage Plans.

"Allied's Funding Advantage stands out in the small group market for its flexibility, transparency and focus on employer savings," Robin said. "With level funding, groups can control costs and even get money back from unused claims. Plus, options like Reference-Based Pricing (RBP) and additional benefits, including Healthcare Assistant, HealthChoices, provider navigation, telemedicine and more cost saving benefits, add unique value you won't find with most traditional carriers."

To contact Robin, email her at rdepenbrock@alliednational.com.

Reminder: Form 5500 & PCORI Fees Due July 31!

Form 5500 Deadline

If your clients have a calendar-year health plan, their Form 5500 must be filed electronically with the IRS by **July 31, 2025**. Allied National sent employers a 5500 Filing Worksheet in late May to help them get started.



PCORI Fees Also Due

PCORI fees also are due **July 31, 2025**. Rates are:

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

Need help? Visit our website for step-by-step filing guides and PCORI info.

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

A Message From Pivot Health Concerning Proposed STM Rule Limits

As part of Pivot Health's commitment to contracted brokers, Pivot Health wants to keep you informed about changes to short-term medical (STM) insurance regulations.



A recent federal rule limits STM plans to three months, with a one-month extension. On

May 19, 2025, a filing was made requesting a six-month stay. On June 2, the court granted a partial stay until Aug. 28, 2025. While many hope for a return to three years, the four-month limit remains in place for now.

Pivot Health understands that regulatory uncertainty can affect your business and is actively monitoring the situation and will share updates as they become available.

In the meantime, continue supporting your clients by offering the longest available coverage. Pivot Health's 12-month STM plan stands out in the market — providing extended coverage with the flexibility to cancel anytime. It's a great option for clients needing protection up to or beyond the Affordable Care Act Open Enrollment.

Kick Off Your Summer Sprint with Pivot Health's Bonus Opportunity!

Do you have clients with short-term medical (STM) plans nearing expiration, or those seeking a flexible alternative to major medical coverage?

Now's the time to sprint ahead and boost your earnings with Pivot Health's Summer Sprint Bonus!

- **Sprint to Success:** Check out the bonus details and claim your personalized sales page to start earning today
- **Flexible Plans:** Choose from 4 to 12-month STM options designed to meet your clients' needs
- **Reliable Coverage:** Give your clients the health protection they want, backed by Pivot Health

Don't let this summer slip away — sign up your clients now and watch your bonus race up! The Summer Sprint ends Sunday, Aug. 31.



[Summer Sprint Flyer](#)





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