



# Agent Bulletin

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

May 2025

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## What to Know This Month

1. Allied to Provide 5500 Filing Worksheet for 2025 Reporting
2. New Insurance Briefing – News You Can Use
3. Pivot Health: Bridging the Health Insurance Gap
4. Polling Results for Limited Benefit Plans
5. Holiday Hours

## Allied to Provide 5500 Filing Worksheet for 2025 Reporting

Allied National will soon mail your Funding Advantage clients a 5500 Filing Information Worksheet to assist with their upcoming federal filing requirements. Please review the important details below with your clients to ensure timely compliance.



### Form 5500 Filing

- **What it is:** Reports employers plan financials and operations to the IRS.
- **Deadline: July 31, 2025** (for calendar-year plans).
- **Who must file:**
  - Small employers (under 100 employees) are generally exempt if the plan is fully insured or unfunded.

- If their plan is **self-funded** (e.g., using a Third-Party Administrator), the government requires employers to file. Allied self-funded plans are considered "funded" and therefore all size groups are required to complete the filing.
- **How to file:** Most small employers can use the 5500-SF (short form). Allied provides the necessary data, but employers are responsible for filing. Click on the Guidance button below.
- **Support:** Filing instructions and resources are available on the Allied website. Click on the Guidance button below.

### PCORI Fee

- **Purpose:** Funds health research through the Patient-Centered Outcomes Research Institute (PCORI).
- **Deadline: July 31, 2025**, via IRS Form 720.
- **Fee amounts employers should pay:**
  - **\$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.**

To assist with both of these filings, we have a page on our website. Please refer to this page for detailed instructions on how to help your clients complete a 5500-SF filing or to learn more about PCORI.

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

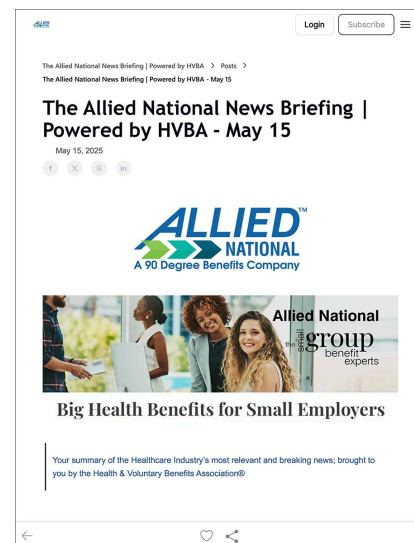


## Insurance Briefing - News You Can Use

Have you had a chance to read our new **“Allied National News Briefing/Powered by HVBA”**?

Allied, in cooperation with the Health & Voluntary Benefits Association® (HVBA), is now emailing a newsletter that summarizes the health care industry’s most relevant and breaking news.

Look for the **[the-allied-national-news-briefing-89f65c@mail.beehiiv.com](mailto:the-allied-national-news-briefing-89f65c@mail.beehiiv.com)** address and check out the button below to see an example of the newsletter.



[Allied National News Briefing](#)



# Pivot Health: Bridging the Health Insurance Gap

With nearly **28 million part-time employees** in the U.S., access to comprehensive health insurance remains a challenge. Unlike full-time workers, many part-time employees face limited or no coverage options.



As demand for flexible work continues to rise, Pivot Health offers a smart, budget-friendly solution. These short-term medical (STM) plans are designed to provide rich benefits that fit a variety of life transitions. Help your clients stay protected and confident as they navigate their careers—with coverage they can count on from Pivot Health.

[Pivot Health](#)

[Pivot State Availability](#)



## Polling Results for Limited Benefit Plans

We regularly post a poll in the new "Allied National News Briefing/Powered by HVBA". Here's the results from our last poll.

**Why would you offer a Limited Benefit plan instead of a traditional major medical plan?**

1. Cost Savings for Employers – *Highest votes*
2. Flexibility and customization opportunities – *Second highest*
3. More affordable for Employees – *No votes*
4. Great starter plan for groups that have never had insurance – *Tied for second highest*



# Allied's Offices Closed Juneteenth Thursday, June 19



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