



Health Plans That Fight for Your Client's Bottom Line

Smarter plans. Fierce value.

At Allied National, we fight for your clients' bottom line with health plans designed to keep costs **predictable, sustainable and aligned with long-term business goals** — not at odds with them.

Our level funded solutions empower you to offer high-quality coverage with smarter spending strategies that reward employers for managing risk responsibly.

Why agents are choosing Allied National:

- **Uncompromising level funded coverage, built to fit different size, budget and needs.**
- **Smarter healthcare spending — Tools that control costs without compromising the member experience.**
- **100% refund potential - Employers receive unused claim funds back — because smart coverage should pay off.**

When employers save money *and* employees get quality care, everyone wins. Including you.

Offer smarter plans with real savings and lasting value.

Reach out to your Allied National representative to learn how to position level-funded coverage as a strategic advantage for your clients.

Freedom Open Access Broker Guide

Allied Sent Form 500 & PCORI Worksheets to Employers

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, 2026. Allied National sent employers 5500 Filing Worksheets to help them get started.

PCORI Fees Due

The Patient-Centered Outcomes Research Institute (PCORI) fee also is due July 31, 2026. The fee was established under the Affordable Care Act to support comparative effectiveness research.

For plan years ending between Oct. 1, 2025, and Sept. 30, 2026, the PCORI fee is \$3.84 per covered life, an increase from \$3.47 for prior plan years.

If your employer client needs assistance with the form or fee, have them visit our website for a step-by-step filing guide and PCORI information.

Form 5500 & PCORI Guidance



JUNE 19TH
**JUNE
TEENTH**
F R E E D O M D A Y

We will be closed on Friday in observance
of the celebration.



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