
From: Angie Kirkland [mailto:Akirkland@pba-fl.com]
Sent: Tuesday, July 19, 2011 2:08 PM
To: Hart, Lita
Subject: RE: Clarification of 6 Months Administration Fees with Termination of Contract

Lita,

Yes, you are correct in your statement below.

Angie Kirkland
PBA

From: Hart, Lita [mailto:Lita.Hart@sumtercountyfl.gov]
Sent: Tuesday, July 19, 2011 12:03 PM
To: Akirkland@pba-fl.com
Cc: Carolee Richendollar; bshelton@pba-fl.com
Subject: RE: Clarification of 6 Months Administration Fees with Termination of Contract

Angie,

Just one final clarification, we will not be subject to the 6 month lump sum payment of Administration Fees, but instead will continue to pay the monthly Administration Fees through December as usual along with the 3 month run out as noted below.

Lita Nell Hart CPRP
Risk Manager
352-689-4430 Phone
352-689-4431 Fax
Email : lita.hart@sumtercountyfl.gov
Website: www.sumtercountyfl.gov

IMPORTANT NOTICE

September 17, 2010, **Sumter County Risk Management** relocated. Please update your contact database to reflect the following changes:

7375 Powell Rd., Suite 219
Wildwood, FL 34785
Phone: 352-689-4430
Fax: 352-689-4431

From: Angie Kirkland [mailto:Akirkland@pba-fl.com]
Sent: Tuesday, July 19, 2011 10:51 AM
To: Hart, Lita
Cc: 'Carolee Richendollar'; bshelton@pba-fl.com
Subject: RE: Clarification of 6 Months Administration Fees with Termination of Contract

Hi Lita,

Yes, we are in agreement that if PBA is not awarded the FSA contract effective 1/1/12, that we will provide the 3 month run-out of the 2011 claims (received 1/1/12-3/31/12) for a fee of \$4.24 per participant per month (Jan, Feb & March 2012). And the County may pay monthly.

There will not be a debit card fee charged after 12/31/2011.

Thank you.

Angie Kirkland

Angie Kirkland

CEO/Vice President

Professional Benefit Administrators, Inc.

Winter Park, FL 32792

Office: 800-762-4130

From: Hart, Lita [mailto:Lita.Hart@sumtercountyfl.gov]

Sent: Tuesday, July 19, 2011 10:06 AM

To: Akirkland@pba-fl.com

Subject: Clarification of 6 Months Administration Fees with Termination of Contract

Importance: High

Good Morning Angie,

As you are aware, Willis of Florida, Inc. is soliciting proposals for our 2012 FSA and Section 125 Plan Administration. In the event PBA is not the vendor recommended for the 2012 Plan Year, we will be requesting permission from our Board next week to give notice of termination of our contract with PBA by the end of this month with an effective date of March 31, 2012, in order to allow for the processing of the 2011 claims runoff. The FSA services with PBA would continue uninterrupted for the duration of the 2011 Plan Year.

Can you please confirm that this will meet the termination requirements of the PBA contract? If so, since the notice will be given more than 6 months prior to termination, will it also be acceptable for us to continue to be billed monthly and pay monthly the \$4.24 per person Administration Fee until the end of March 2012 instead of making payment in one lump sum? I had discussed this option with Robert Washick back in December 2010 as we were firming up the details of the current contract and he indicated that this would be acceptable. Also for clarification, we would continue to pay the \$2.12 per enrolled employee Card Fee through December 31, 2011 and but we would not be responsible for any additional card fees from January 1 through March 31, 2012 as there would not be any card activity after December 31, 2011 for the 2011 Plan Year. Is this a correct interpretation?

I am preparing the Executive Summary today for the meeting next week. If you can provide a written response by the end of the day today it would be greatly appreciated. For convenience I have attached a copy of the signed contract with this email. I may be reached by phone at 352-689-4434 if you have any questions. Thank you Angie.

<<FSA 2011 Approved Renewal.pdf>>

Lita Nell Hart CPRP

Risk Manager

352-689-4430 Phone

352-689-4431 Fax

Email : lita.hart@sumtercountyfl.gov

Website: www.sumtercountyfl.gov

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