

Your One-Stop Solution for: Human Resource Solutions • ERISA Compliance • Benefits Administration



UPWARD

Benefits Solutions, LLC

INSURANCE | HR MANAGEMENT | CONSULTING

806.350.3555

julie@upwardbenefits.com

- Employee Handbooks
- HR Support Packages
- Monthly HR Consulting
- HR & Compliance Audits
- Supervisor Training
- Employee Training
- Compensation Plan Design
- Employee Opinion Surveys
- Corrective Action & Terminations
- FMLA
- Exempt vs Nonexempt Determination
- On boarding New Hires
- Pre-Hire Services
- Other HR Projects or Outsourcing

ERISA Compliance

- Benefit Compliance Assessment
- SPD Wraps - ERISA Plan Document
- POPs - Section 125
- Employee Notifications
- Summary of Material Modifications
- Benefit Compliance Evaluation
- Online Document Delivery
- FSA Wraps
- HRA Wraps

Benefits Administration

- FSAs - Flexible Spending Accounts
- HRAs - Health Reimbursement Accounts
- HSAs - Health Savings Accounts
- COBRA

Julie is very professional, and the advice given is excellent. Julie and her team stepped right in and organized our employee files and worked with our management team closely to get things in order. Her availability is amazing.

Tiffani Benally, Op Mgr.
Four Corners Federal Credit Union

Our History

With over 40 years of experience, we bring only the highest quality healthcare plans to our customers. We work diligently to continually address the costly problems of well care benefits, preventative care benefits, disease management, plan utilization, pharmacy benefits, and high-risk claimants.

We are committed to providing the highest performing benefit packages and the absolute best products and services in the industry. Upward Benefits Solutions works directly with only the top financially rated and stable Insurance companies in the market.



Upward Benefits has saved us time, money, and frustration. We are a mission driven agency, and we needed professional assistance to deal with benefits and HR matters that were distracting us from focusing on the people that we serve. Upward Benefits is a partner, not only in our mission, but in providing responsive support to every member of our team.

Joe Rogers- CEO
Panhandle Independent Living Center

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Amarillo, TX 79109
806-350-3555
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Customized Healthcare

- Group and Individual Health plans
- Dental Insurance
- Vision Insurance
- Life Insurance
- Short & Long - Term Disability
- Long Term Care Insurance
- Medicare Advantage
- Medicare Supplements

HR Consulting

- Employee File Updates
- Employee Handbooks
- HR Audits
- Compliance Audits
- Admin Forms
- Evaluation & Employee Reviews
- On-boarding New Hires
- Pre - Hire Services
- Correction Action & Terminations



**Upward Benefits
Solutions is the area's
premier Employee
Benefits, Healthcare
and
HR Consulting Firm.**

**Call today to schedule
a free consultation**

806-350-3555

Exceptional Service

For plan implementation to excellent servicing, we are here for you. We Provide the following at NO EXTRA COST TO YOU:

Employee Enrollment Meetings: Our staff will conduct meetings in-person and answer all questions.

Claim Issues: We encourage your employees to contact us first for any issues with insurance companies, doctors, and providers. We work for you!

COBRA & State Continuation: We have the most recent information and solutions for your COBRA or State Continuation coverage.

Plan Reviews and Market Analysis: We will shop the market 60-90 days before renewal. In our annual renewal meeting, we will discuss various options to keep costs in line with your expectations.

Compliance Issues: We will keep you updated and assist you with compliance with Section 125 POP, ERISA Plan Documents and ACA Requirements.