

Client Eligibility Worksheet



AgriPlan and BizPlan Section 105 Health Reimbursement Arrangements (HRAs) save small business owners an average of more than \$5,500 a year on their taxes. For those businesses with multiple employees, a Stand-Alone HRA, Healthcare Premium Reimbursement Account (NESP) and Healthcare FSA combination available through TASC's Universal Benefit Account platform may be the answer! Please complete this form and return it to your TASC Representative for a FREE Tax Savings Analysis.

Your Name _____ Your Tax Preparer's Name _____

Business Name _____

Address _____ City _____ State _____ Zip _____

E-Mail Address _____

Your Phone Number _____ Tax Preparer's Phone Number _____

Insurance Policy Group Individual None Carrier _____

What is the tax filing status of your business?

- Sole Proprietor, filing Schedule F Sole Proprietor, filing Schedule C
 C-Corporation S-Corporation Partnership Other

Are you currently married?

Yes No

If you answered Yes, does your spouse assist you in your business?
(answering phones, website design, bookkeeping, delivery, etc.)?

Yes No

Do you currently have any unrelated employees in your business?

Yes No

If you answered Yes ...

How many work more than 25 hours per week? _____

How many complete more than 7 months of employment annually? _____

How many are over age 25? _____

Approximately how much do you spend annually on the following medical expenses?

Health Insurance Premiums \$ _____
(include any accident, hospital indemnity, cancer,
vision and dental insurance etc.)

Long-Term Care Premiums \$ _____

Out-of-Pocket Medical Expenses \$ _____
(include prescription drugs, co-pays, deductibles etc.)

Vision (include contact lenses, glasses, eye exams, etc.) \$ _____

Dental (include routine cleanings, exams, etc.) \$ _____

TOTAL \$ _____

Client Signature _____

Provider _____

Retail/Wholesale Code _____