



REGISTRATION

GENERAL INTERROGATORIES

1. Is this JPA Plan maintained for the purpose of complying with any workers' compensation law or unemployment compensation disability insurance law?

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2. Is this JPA Plan primarily for the purpose of providing first aid care and treatment, at a dispensary of the employer, for injury or sickness of employees while engaged in their employment?\_\_\_\_\_. (If yes, please describe below).

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3. Has this JPA Plan been in existence and in operation prior to submission of this Application to the Idaho Department of Insurance?\_\_\_\_\_. If yes, provide the effective date of initial operation:\_\_\_\_\_.

4. Give the complete names and addresses of the members(s) of the JPA Plan and Trust for whose employee-beneficiaries the trust fund will be, or is, operated:

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5. Give the complete name, address, and contact information of every trustee(s) of the JPA Plan and Trust:

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6. Give the complete name, address, and contact information of the administrator of the JPA Plan and Trust.

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7. Give the complete name(s), address, and contact information of any consultant employed by, and/or contracted with, the JPA Plan and Trust.

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8. Give the complete name(s), address, and contact information of insurance producers, if any, including agents or brokers transacting business with the JPA Plan and Trust, if any.

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9. Give the complete name(s), address, and contact information of any associated or affiliated plans and/or trust funds under the management, control, or operation of the administrator or trustees named above.

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10. If benefits are currently or to be provided by any means other than direct payments of benefits out of a trust; please complete the following schedule and attach a copy of the group policy and/or other contract covering these benefits:

General  
Description  
of Benefit:

Name & Address of Person  
Providing Benefits:

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11. Are all contributions to the JPA Plan and Trust currently, or are to be, payable in advance? \_\_\_\_\_
12. Does the JPA Plan operate under the provisions of a Trust Agreement between the JPA members and the Trustee? \_\_\_\_\_. **If so, please attach a copy of the Trust Agreement.**
13. Does the JPA Plan have bylaws of any kind? \_\_\_\_\_. **If so, please attach a copy of any bylaws.**
14. Have instructions, guidelines, or rules, including the requirements for trustee fiduciary duties, been established for trustees and administrators of the JPA Plan? \_\_\_\_\_. **If so, please provide a copy of such instructions, guidelines, or rules.**
15. If the JPA Plan and Trust is currently in operation or is planned to be in operation in the future, have each and every employee-beneficiaries of the members of the JPA Plan and Trust received, or will each future employee-beneficiary receive, a written statement or schedule adequately and clearly stating all benefits allowable under the JPA Plan, together with all applicable restrictions, limitations and exclusions, and the procedure for filing a claim for benefits? \_\_\_\_\_. **Please provide a copy of such a plan or written benefit statement.**
16. If the JPA Plan and Trust is currently in operation, how often is the Trust Fund audited by an independent accountant? \_\_\_\_\_

Please provide the name and address of auditing firm:

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**Please attach the most recent copy of any such audit.**

17. (a) Have all individuals that will handle receipts and disbursements for the JPA Trust Fund been bonded under a fidelity bond issued by a Surety authorized to transact such surety business in the State of Idaho, pursuant to [Idaho Code §41-4114\(3\)](#) and [IDAPA 18.01.28.027](#)? \_\_\_\_\_

If so, give name and address of the Surety \_\_\_\_\_

\_\_\_\_\_

and the amount of fidelity coverage: \_\_\_\_\_

(b) Are individuals handling receipts and disbursement for the Trust Fund licensed as third party administrators in accordance with title 41, chapter 41, Idaho Code? If so, please identify the name(s), address, and contact information of such licensees.

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(c) Are administrators that administer the JPA Plan and Trust properly licensed under title 41, chapter 9, Idaho Code, and properly bonded in accordance with section [Idaho Code §41-911\(8\)](#)?\_\_\_\_\_

18. Has the JPA Plan and Trust engaged an actuary to determine rates and claims reserves, including IBNR, pursuant to [Idaho Code §§ 41-4105\(2\)\(f\)](#) and [41-4110](#), and [IDAPA 18.01.28.026](#)?\_\_\_\_\_

If so, please give the complete name, address, and contact information of the qualified actuary:\_\_\_\_\_

19. Does the JPA Plan and Trust have competent and trustworthy accountants to timely prepare monthly and quarterly financial statements for the Plan? If so, give the complete name, address, and contact information of said accountant(s):

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20. Please complete the attached chart on page 6.

Benefit	BENEFITS CHECKED ARE PROVIDED				CONTRIBUTIONS ARE MADE BY		APPROX. NUMBER OF BENEFICIARIES COVERED	
	Directly Out of Trust Fund	By Insurance Carrier(s)	By Hospital and Medical Serv. Plans	Other (Specify)	Employer	Employee Payroll Deduction	Employee	Covered Deps.
Disability Income								
Hospital								
Medical								
Surgical								
Dental								
Vision Services								
Other (Specify)								