



How Sync with miEdge

v1.02

# Agenda

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- What Does The Integration Do?
- When Does It Sync?
- What Happens When You “Sync with miEdge”

# What Does the Integration Do?

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**When you click “Sync with miEdge” from any Account record in BenefitsGuide, the system uses fuzzy logic to match that record with the companies actual filings in the miEdge database.**

**With as little as a company name and website or the company name and address, you can use miEdge data to identify both group insurance and retirement planning opportunities.**

# What Does the Integration Do?

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**For employee benefits brokers, miEdge aggregates health and welfare data from multiple sources, including Form 5500 filing data.**

**From any Account record in BenefitsGuide, you can “sync with miEdge” and immediately learn everything about your prospect or clients reported:**

- commissions
- premiums
- fees and carrier bonuses
- lines of coverage
- renewal dates
- service providers
- self-funded plans
- stop/loss plans
- fully insured plans
- related accounting firms

# What Does the Integration Do?

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**For brokers who sell group retirement plans, use miEdge Retirement data intelligence to quickly and easily determine if your prospect needs your service.**

**From any Account record in BenefitsGuide, you can “sync with miEdge” and immediately learn everything about your prospect or clients reported:**

- 401k's
- 403b's
- defined benefit plans
- defined contribution plans





**Immediately learn the plan:**

- asset performance
- size
- employee participation percentages
- average assets per employee
- critical data on fidelity bond compliance
- corrective distributions
- broker/consultants
- centers of influence
- unions
- renewal dates
- compliance issues

# When Does It Sync?



Ford Motor Company



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Account Detail

EditDeleteSharingBernie ButtonSync with BerniePortalSync with miEdge

▼ Account Information

Account Owner	 Jason Silverman <a href="#">[Change]</a>	Account Record Type	Account (Small Group) <a href="#">[Change]</a>
Account Name	Ford Motor Company <a href="#">[View Hierarchy]</a>	Account Status	 Prospect

# Fields Included in the Sync

## ▼ miEdge Details

Entity Name FORD MOTOR COMPANY

Industry Transportation/Trucking/Railroad

Ein ⓘ 380549190

Muns ⓘ M84000011810980

Admin Name

Preparer Name ⓘ

Current Retirees ⓘ

Db Name ⓘ

Display Name FORD MOTOR COMPANY

Eligible Employees ⓘ

Employee Count 32,949

Employee Range

Exception Code 0

Year Founded 1903

Filed Date 1/10/2018

Sic 3711

Account Ford Motor Company

Future Retirees ⓘ

Largest Lob ⓘ

Match Score ⓘ 17

Naics ⓘ 336,100

Renewal Date ⓘ

# Fields Included in the Sync

## ▼ Status Indicators from Form 5500 filings

Extension Filed ?	Multi Employer ?
Delinquent Filings ?	Self Funded ?
Collective bargained	First Filings ?
Mega Wrap ?	Final Filings ?

## ▼ Contact Details

Admin Phone 📞		Email	<a href="mailto:mhendra@ford.com">mhendra@ford.com</a>
Phone Number	13132065789	Fax Num	13133232913

## ▼ Address

AddressType S		Address Two ?	
Address One ? 1 AMERICAN RD		State ? MI	
Zip ? 48126		Country UNITED STATES	
City ? DEARBORN		County ? WAYNE	

# Fields Included in the Sync

## ▼ Social Networking Details


Website	<a href="http://ford.com">http://ford.com</a>	Webdomain	<a href="http://ford.com">http://ford.com</a>
LinkedIn URL		Facebook URL	<a href="https://www.facebook.com/ford">https://www.facebook.com/ford</a>
Logo URL	<a href="https://media.licdn.com/media/p/1/005/09d/001/2...">https://media.licdn.com/media/p/1/005/09d/001/2...</a>	Twitter URL	<a href="https://twitter.com/ford">https://twitter.com/ford</a>
Google Plus URL		Latitude	
Favicon URL	<a href="http://www.ford.com/cmslibs/etc/designs/brand_f...">http://www.ford.com/cmslibs/etc/designs/brand_f...</a>	Longitude	42.3172455 -83.2080251
Geocoding Precision	10		

## ▼ Description

Naics Description	Motor Vehicle Mfg
Description	Ford Motor Co. is engaged in the manufacturing and distribution of automobiles across six continents. The company through its subsidiaries also engages in other businesses, including financing vehicles. The company operates through two business sectors: Automotive and Financial Services. The Automotive sector operates through four business segments: Ford North America, Ford South America, Ford Europe and Ford Asia Pacific Africa. The Ford North America segment is engaged in the sale of Ford and Lincoln brand vehicles, service parts and accessories in North America. The Ford South America segment is engaged in the sale of Ford brand vehicles and related service parts and accessories in South America. The Ford Europe segment is engaged in the sale of Ford brand vehicles and related service parts and accessories in Europe, Turkey and Russia. The Ford Asia Pacific Africa segment includes primarily the sale of Ford brand vehicles and related service parts and accessories in the Asia Pacific region and South Africa. The Financial Services sector operates through two segments: Ford Credit and Other Financial Services. The Ford Credit segment provides vehicle related financing, leasing, and insurance through the company's wholly owned subsidiary Ford Motor Credit Co. LLC. The Other Financial Services segment includes a variety of businesses, including holding companies and real estate. Ford Motor was founded by Henry Ford on June 16, 1903 and is headquartered in Dearborn, MI.
Sic Description	Motor vehicles and car bodies

# Fields Included in the Sync

## miEdge Employers

[miEdge Employers Help](#) 

Action	Employer #	Industry	Year Founded	Ein
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">E-0000040</a>	Transportation/Trucking/Railroad	1903	380549190

 miEdge Employer  
**E-0000040**












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[Employer Summaries \(1\)](#) | [miEdge Heath and Welfare \(5+\)](#) | [Retirement Plans \(5+\)](#)

### miEdge Employer Detail

- Edit
- Delete
- Sync Summary
- Sync Lines Of Business
- Sync Retirement Plans

Entity Name	FORD MOTOR COMPANY	Account	<a href="#">Ford Motor Company</a>
Industry	Transportation/Trucking/Railroad	Future Retirees	
Ein	 380549190	Largest Lob	
Muns	 M84000011810980		
Admin Name		Match Score	 17
Preparer Name		Naics	 336,100
		Renewal Date	
Current Retirees			
Db Name			
Display Name	FORD MOTOR COMPANY		
Eligible Employees			
Employee Count	32,949		
Employee Range			
Exception Code	0		
Year Founded	1903		
Filed Date	1/10/2018		
Sic	3711		

### ▼ Status Indicators from Form 5500 filings

Extension Filed		Multi Employer	
Delinquent Filings		Self Funded	
Collective bargained		First Filings	
Mega Wrap		Final Filings	

# Fields Included in the Sync

## ▼ Contact Details

Admin Phone		Email	<a href="mailto:mhendra@ford.com">mhendra@ford.com</a>
Phone Number	13132065789	Fax Num	13133232913

## ▼ Address

Address Type	S	Address Two	
Address One	1 AMERICAN RD	State	MI
Zip	48126	Country	UNITED STATES
City	DEARBORN	County	WAYNE

## ▼ Social Networking Details

Website	<a href="http://ford.com">http://ford.com</a>	Webdomain	<a href="http://ford.com">http://ford.com</a>
Linkedin URL		Facebook URL	<a href="https://www.facebook.com/ford">https://www.facebook.com/ford</a>
Logo URL	<a href="https://media.licdn.com/media/p/1/005/09d/001/2...">https://media.licdn.com/media/p/1/005/09d/001/2...</a>	Twitter URL	<a href="https://twitter.com/ford">https://twitter.com/ford</a>
Google Plus URL		Latitude	
Favicon URL	<a href="http://www.ford.com/cmslibs/etc/designs/brand_f...">http://www.ford.com/cmslibs/etc/designs/brand_f...</a>	Longitude	42.3172455 -83.2080251
Geocoding Precision	10		

## ▼ Description

Naics Description Motor Vehicle Mfg

Description Ford Motor Co. is engaged in the manufacturing and distribution of automobiles across six continents. The company through its subsidiaries also engages in other businesses, including financing vehicles. The company operates through two business sectors: Automotive and Financial Services. The Automotive sector operates through four business segments: Ford North America, Ford South America, Ford Europe and Ford Asia Pacific Africa. The Ford North America segment is engaged in the sale of Ford and Lincoln brand vehicles, service parts and accessories in North America. The Ford South America segment is engaged in the sale of Ford brand vehicles and related service parts and accessories in South America. The Ford Europe segment is engaged in the sale of Ford brand vehicles and related service parts and accessories in Europe, Turkey and Russia. The Ford Asia Pacific Africa segment includes primarily the sale of Ford brand vehicles and related service parts and accessories in the Asia Pacific region and South Africa. The Financial Services sector operates through two segments: Ford Credit and Other Financial Services. The Ford Credit segment provides vehicle related financing, leasing, and insurance through the company's wholly owned subsidiary Ford Motor Credit Co. LLC. The Other Financial Services segment includes a variety of businesses, including holding companies and real estate. Ford Motor was founded by Henry Ford on June 16, 1903 and is headquartered in Dearborn, MI.

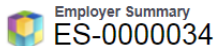
Sic Description Motor vehicles and car bodies

Created By [Jason Silverman](#), 4/10/2018 9:56 AM

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## Employer Summary Detail

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Employer Summary #	ES-0000034	Lead Carrier	PRUDENTIAL INSURANCE COMPANY OF AMERICA
Eligible Employees	61,247	Agent 1	MERCER HEALTH BENEFITS
Renewal Date	1/1/2017	Agent 1 Acquired Or Normalized	MERCER HEALTH AND BENEFITS
Premium	618,721,652	Agent 1 Address 1	PO BOX 10414
Revenue	352,759	Agent 1 Address 2	
Fees	0	Agent 1 City	DES MOINES
Commission	352,759	Agent 1 County Name	Polk
Lead Carrier Acquired Or Normalized	PRUDENTIAL	Agent 1 State	IA
		Agent 1 Zip	50306
Admin Name	LAURA SWARTZMILLER	Agent 2	STERLING INSURANCE GROUP
Admin Phone		Agent 2 Acquired Or Normalized	STERLING GROUP
Self Funded		Agent 2 Address 1	13900 LAKESIDE CIR
Current Retirees	76,794	Agent 2 Address 2	
Future Retirees	38	Agent 2 City	STERLING HEIGHTS
Multi Employer	N	Agent 2 State	MI
Collective Bargained	Y	Agent 2 Zip	48313
First Filings	N	Accountant	GEORGE JOHNSON & COMPANY
Mega Wrap	N	Preparer Name	
Delinquent Filings	N	Largest Provider Name	
Extension Filed	Y	Largest Provider Revenue	
Final Filings	N	Largest Provider Service	
Employer	E-0000040		
Largest Lob	LONG-TERM CARE		
Muns	M84000011810980		
Created By	Jason Silverman, 4/10/2018 9:56 AM	Last Modified By	Jason Silverman, 4/10/2018 9:56 AM

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## miEdge Heath and Welfare

[miEdge Heath and Welfare Help](#) ?

Action	miEdge Heath and Welfare #	Carrier Ein	Carrier Name	Dental	Health	Long Term Disability	Life Insurance	Vision	Temporary Disability
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">LOB-0004346</a>	221211670	PRUDENTIAL INSURANCE COMPANY OF AMERICA	N	N	N	N	N	N
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">LOB-0004347</a>	520913817	UNICARE LIFE & HEALTH INSURANCE COMPANY	N	N	Y	N	N	N
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">LOB-0004348</a>	382084788	HERITAGE VISION PLANS, INC.	N	N	N	N	Y	N
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">LOB-0004349</a>	520913817	UNICARE LIFE & HEALTH INSURANCE COMPANY	N	N	N	N	N	N
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">LOB-0004350</a>	382242827	HEALTH ALLIANCE PLAN	N	Y	N	N	N	N

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## Retirement Plans

[Retirement Plans Help](#) ?

Action	Retirement Plan Name	Plan Name	Plan Type	Accounting Firm Name	Eligible Employees	Enrolled Employees
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RT-0000500</a>	FORD RETIREMENT PLAN	Defined Contribution Pension,Other Pension Benefit	PLANTE & MORAN, PLLC	15,799	17,281
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RT-0000501</a>	FORD MOTOR CO. SAVINGS AND STOCK INVESTMENT PLAN FOR SALARIED EMPLOYEES	Defined Contribution Pension,Other Pension Benefit	PLANTE & MORAN, PLLC	32,949	46,020
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RT-0000502</a>	FORD MOTOR CO. TAX-EFFICIENT SAVINGS PLAN FOR HOURLY EMPLOYEES	Defined Contribution Pension,Other Pension Benefit	PLANTE & MORAN, PLLC	58,959	74,173
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RT-0000503</a>	FORD MOTOR COMPANY GENERAL RETIREMENT PLAN	Defined Benefit Pension,Other Pension Benefit	PLANTE & MORAN, PLLC	17,676	0
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">RT-0000504</a>	AUTOALLIANCE INTERNATIONAL, INC. RETIREMENT PLAN FOR EMPLOYEES REPRESENTED BY THE UAW	Defined Benefit Pension,Other Pension Benefit	PLANTE & MORAN, PLLC	1,695	0

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LOB-0004346

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[HW Brokers \(0\)](#)

## miEdge Heath and Welfare Detail

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miEdge Heath and Welfare #	LOB-0004346	Premium	1,360,650
Renewal Date	1/1/2017	Revenue	190,491
Participants	999	Revenue Percent Of Premium	14.00
Carrier Name	PRUDENTIAL INSURANCE COMPANY OF AMERICA	Commission	190,491
Carrier Name Normalized	PRUDENTIAL	Commission Percent Of Premium	14
Carrier Ein	221211670	Fees	0
Contract Number	51464-LTC		
		Vision	N
Health	N	Temporary Disability	N
Hmo Contract	N	Long Term Disability	N
PPO Contract	N	Supplemental Unemployment	N
Prescription Drug	N	Indemnity Contract	N
Dental	N	Stop Loss	N
Life Insurance	N	Other Contract	Y
Muns	M84000011810980	Other Contract Detail	LONG-TERM CARE
Plan	559,248	Id	1,719,631
Business Travel		Employer	E-0000040
Created By	Jason Silverman, 4/10/2018 9:56 AM	Last Modified By	Jason Silverman, 4/10/2018 9:56 AM

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## HW Brokers

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Retirement Plan  
RT-0000500

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## Retirement Plan Detail

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Retirement Plan Name	RT-0000500	Id	4,393,289
Plan Type	Defined Contribution Pension, Other Pension Benefit	First Return	0
Plan Name	FORD RETIREMENT PLAN	Final Return	0
Renewal Date	1/1/2017	Pension Codes	2A2E2F2G2T3F3H3J
Eligible Employees	15,799	Accounting Firm Name	PLANTE & MORAN, PLLC
Enrolled Employees	17,281	Administrator Name	
Current Retirees	12	Preparer Name	
Future Retirees	1,476	Preparer Firm Name	
Employee Count Boy	17,249	Preparer Address 1	
Employee Count Eoy	15,799	Preparer Address 2	
Assets Boy	226,164,125	Preparer City	
Assets Eoy	293,174,072	Preparer State	
Average Employee Balance	16,965	Preparer Zip	
Employee Contribution	0	Third Party Payments	0
Employer Contribution	50,684,250	Provider Payments	0
Corrective Distributions	0		
Participant Loans	0		
Fidelity Bond Amount	10,000,000		
Fidelity Bond Ratio	4.42		
Employer	E-0000040	Sponsor Address 1	TAX DEPARTMENT
Administrator Care Of Name		Sponsor Address 2	1 AMERICAN ROAD, FORD WHQ, ROOM 612
Sponsor Signed Date		Sponsor City	DEARBORN
Administrator Ein		Sponsor Ein	380549190
Administrator Phone Number		Sponsor Phone Number	3133225012
Administrator Signed Date	6/30/2017	Sponsor Signed Name	
Administrator Signed Name	ROBIN WOOD	Sponsor State	MI
Muns	M84000011810980	Sponsor Zip	48126
Administrator Address 1		Ack Id	2017071007509P040034635613001
Administrator Address 2			
Administrator City			
Administrator State			
Administrator Zip			
Created By	Jason Silverman, 4/10/2018 9:56 AM	Last Modified By	Jason Silverman, 4/10/2018 9:56 AM

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