

ERISA RATES [\(ERISA Fidelity Policy\)](#)

As of September 17, 2014 these rates are available in: #`

AUTHORITY

Agency Issuance Authority is limited to \$500,000 and is based on the following parameters:

- | | |
|---|---|
| (1) Non Union Plans | (4) Use of Travelers ERISA Fidelity Policy Form |
| (2) No Non Qualifying Assets | (5) No Employer Securities |
| (3) No Designated Agents or Additional Named Insured coverage | (6) No Known or Prior Losses |

If your applicant does not meet these criteria, please contact your Travelers Bond Express ERISA Underwriter.

COVERAGE LIMITS AND PREMIUM

POLICY LIMIT	3 YEAR PREPAID PREMIUM
\$10,000	\$105
\$20,000	\$109
\$30,000	\$132
\$40,000	\$151
\$50,000	\$171
\$60,000	\$189
\$70,000	\$208
\$80,000	\$223
\$90,000	\$235
\$100,000	\$247
\$110,000	\$253
\$120,000	\$259
\$130,000	\$265
\$140,000	\$271
\$150,000	\$277
\$160,000	\$282
\$170,000	\$288
\$180,000	\$294
\$190,000	\$299
\$200,000	\$305
\$210,000	\$311
\$220,000	\$316

POLICY LIMIT	3 YEAR PREPAID PREMIUM
\$230,000	\$322
\$240,000	\$328
\$250,000	\$333
\$275,000	\$348
\$300,000	\$362
\$325,000	\$376
\$350,000	\$390
\$375,000	\$404
\$400,000	\$419
\$425,000	\$433
\$450,000	\$447
\$475,000	\$461
\$500,000	\$475
\$550,000	\$529
\$600,000	\$583
\$650,000	\$637
\$700,000	\$691
\$750,000	\$745
\$800,000	\$799
\$850,000	\$853
\$900,000	\$907
\$950,000	\$961
\$1,000,000	\$1,015

UNDERWRITING GUIDELINES

The Employee Retirement Income Security Act of 1974 (ERISA) requires a Plan Fidelity Policy to equal 10% of the funds handled by a Trustee or Fiduciary with a maximum policy limit of \$500,000 per Plan.*

The Limit of Liability for the Policy should equal the sum of the required ERISA Policy amount for each Plan.

The Travelers ERISA Fidelity Policy contains a unique Inflation Guard feature. This feature automatically provides a limit of insurance, per plan, adjusted at the plan's fiscal anniversary date, equal to the limit of insurance required by ERISA. Inflation Guard is optional; please review coverage for complete details.

(Please note that a surcharge will be for this added protection, applied to our low ERISA Policy premiums at renewal.)

*ERISA may require the limit to exceed \$500,000 if a plan holds non qualifying assets or employer securities.

Travelers Casualty and Surety Company of America and its property casualty affiliates. One Tower Square, Hartford, CT 06183.

Availability of coverage referenced in this document can depend on underwriting qualifications and state regulations

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