



Multiple Employer Welfare Arrangements (MEWAs)

All licensed Multiple Employer Welfare Arrangements must file the following documents annually (see 28 Texas Administrative Code §7.1912):

- An audited financial statement prepared by a licensed Certified Public Accountant within ninety (90) days from the end of their fiscal year
- Actuarial Opinion due within ninety (90) days from end of their fiscal year
- A copy of Form 5500 as was filed with the Internal Revenue Service, due at the same time as the annual CPA audited financial statement if it is available
- A filing fee of \$500.00

In addition to the above annual filings, MEWAs must file the following documents as needed when changes occur:

- Amended Trust Agreement if there are any changes in trustees or conditions of the Trust
- Amended Service Agreements, Agency Agreements and Management Agreements should any changes in contractual obligations occur during the reporting period

Send original documents to: **Financial Analysis MC 303-1A**
 Texas Department of Insurance
 P.O. Box 149104
 Austin, Texas 78714-9104

PLEASE CALL (512) 322-5002 IF YOU HAVE ANY QUESTIONS