

**Commercial Blanket Fidelity  
Bond Rates For Pension Plan Bonds  
Under the Pension Reform Act of – 1975 ERISA**

**CALIFORNIA RATES**

<b><u>Bond Amount</u></b>	<b><u>3-Year Prepaid</u></b>	<b><u>Bond Amount</u></b>	<b><u>3-Year Prepaid</u></b>
\$10,000.00	\$100.00	\$75,000.00	\$186.00
\$20,000.00	\$100.00	\$80,000.00	\$190.00
\$25,000.00	\$109.00	\$90,000.00	\$200.00
\$30,000.00	\$117.00	\$100,000.00	\$208.00
\$40,000.00	\$131.00	\$125,000.00	\$220.00
\$50,000.00	\$150.00	\$150,000.00	\$231.00
\$60,000.00	\$164.00	\$200,000.00	\$252.00
\$70,000.00	\$179.00	\$250,000.00	\$272.00

Limits from \$251,000.00 to \$500,000.00 are available call for Quote  
Above rates are based on 5 fiduciaries, over 5 fiduciaries are rated differently.

**PENSION TRUST/ERISA BONDS  
A Bond Designed to Protect Your Valuable Pension Programs**

**WHAT ARE PENSION TRUST/ERISA BONDS?**

Many companies today offer pension plans and/of profit sharing programs as part of a benefit package for their employees. These programs are managed by appointed individuals associated with the company's plan, known as fiduciaries. To protect the plan and the money in these funds from fraud and dishonesty, the appointed fiduciaries need to be bonded. The pension trust bond from Old Republic Surety Company\* does just that.

**WHY IS THIS BOND NEEDED?**

The Pension Reform Act of 1974 (also know as ERISA –Employee Retirement and Income Security Act) states that the funds of pension or profit sharing plans must be protected under a fidelity bond for 10% of the amount of funds handled. As an example a person who manages a profit sharing program that involves \$250,000.00 in funds must post a bond for \$25,000.00. The Commercial Blanket fidelity bond available from old Republic Surety Company\* satisfies the requirement at a reasonable cost.

**APPLY FOR COVERAGE NOW**

Mail the completed application along with your check payable to: **BOND PROFESSIONAL**  
800-622-6637 or 619-670-1136 P.O. Box 42  
619-670-5026 FAX or Email [bondpro1@cox.net](mailto:bondpro1@cox.net) Spring Valley, CA. 91976-0026  
DOI License # OB33276

Rates are subject to change with out notice. Applicant must meet underwriting guidelines.  
\*Bonds are underwritten by Old Republic Surety Company