PROFILE

MONTE NIDO & AFFILIATES

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FL 33143

+1 (305) 663-1876

http://montenido.com

MSID M84000039148429

EIN 954552790

http://www.facebook.com/oliverpyattcenterspage

https://www.linkedin.com/company/monte-nido-&-

affiliates

in.

https://twitter.com/themontenido

NAICS codes

621420 - Outpatient Mental Health and Substance Abuse Centers

623110 - Nursing Care Facilities (Skilled Nursing Facilities)

624190 - Other Individual and Family Services

623220 - Residential Mental Health and Substance Abuse Facilities

621510 - Medical & Diagnostic Laboratories

621399 - Offices of All Other Miscellaneous Health Practitioners

621111 - Offices of Physicians (except Mental Health Specialists)

622310 - Specialty (except Psychiatric and Substance Abuse)

Hospitals

621999 - All Other Miscellaneous Ambulatory Health Care Services

622210 - Psychiatric and Substance Abuse Hospitals

and 12 others

Monte Nido and Affiliates residential and intensive outpatient eating disorder and exercise addiction treatment programs located in CA, OR, NY, MA, and PA.

::	1,000 - 4,999 employees				\$	50M - 10	00M revenu	ie			
		2023		2022	2021		2020	201	9	2018	2017
Eligib	ole Employees	1,101		577	501		362	28	88	368	405
900	Key Influencers			N COMPANI N COMPANI roker					NORTH AN	MERICA, INC MERICA	
	LOCKTON COMPAN LOCKTON COMPAN Benefits Broker					AN		ORTH AMER ORTH AMER			
	CREATIVE PLANNIN Retirement Advisor/C					Acc	ORRILLO AN	ND ASSOCIA m	ATES		
	Key Indicators	M									
KPI's		2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Mega	a Wrap		M	M	M	M	M	M	M		
Colle	ctively Bargained										
Self-f	funded Employee Benefits	5									
Filing	g with no Schedule A										
Multi	ple Employer (Welfare)										
Multi	ple Employer (Retirement	t)									
Filing	g Status	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015

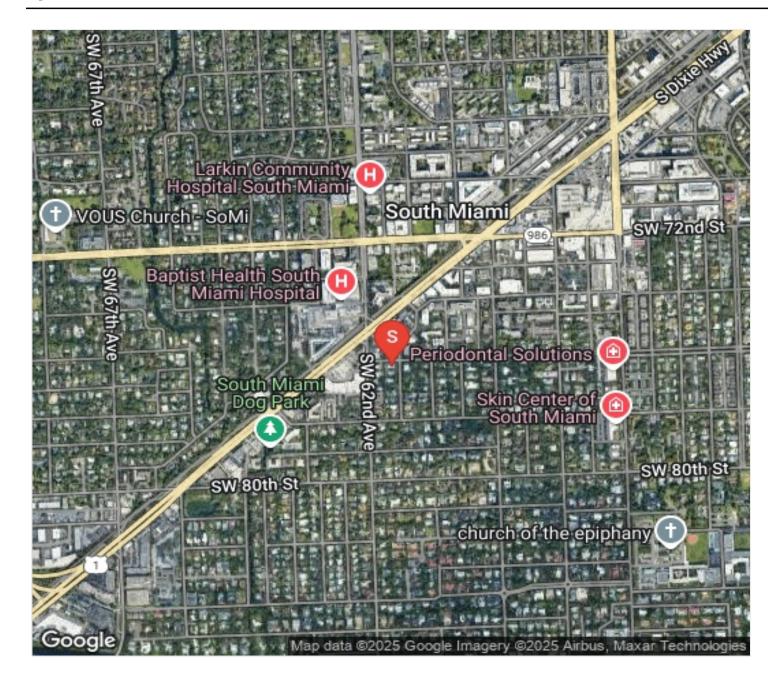
Deliquent Filing			
First Welfare Filing		1	
Final Welfare Filing			
Extension Filed	•1		
First Retirement Filing			
Final Retirement Filing			
O Location	SOUTH MIAMI, MIAMI-DADE COUNTY - FLORIDA		

Top 5 Carriers for Miami-dade County - Florida

Rank	Carrier	Premium
1	UNITED HEALTHCARE	\$2,042,603,339
2	AETNA	\$1,306,653,872
3	ANTHEM	\$703,424,456
4	KAISER	\$302,776,916
5	CIGNA	\$221,007,633

Top 5 Brokers for Miami-dade County - Florida

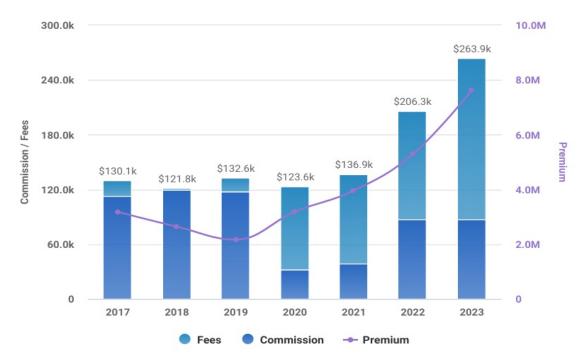
Rank	Broker	Commission	Fees
1	AMWINS	\$9,275,160	\$38,683
2	MARSH AND MCLENNAN AGENCY	\$6,397,755	\$1,565,020
3	AON	\$5,189,855	\$563,864
4	GALLAGHER	\$4,593,739	\$771,813
5	LOCKTON COMPANIES	\$3,589,046	\$747,295



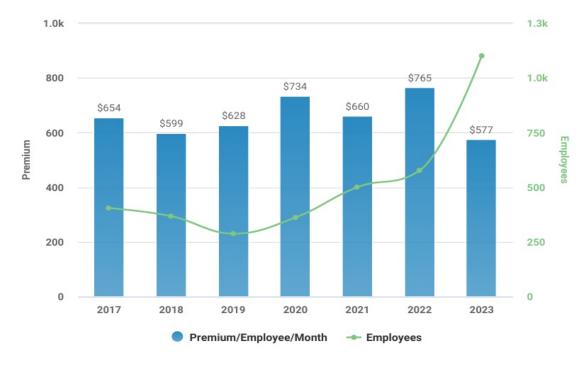
INSIGHTS

BENEFITS

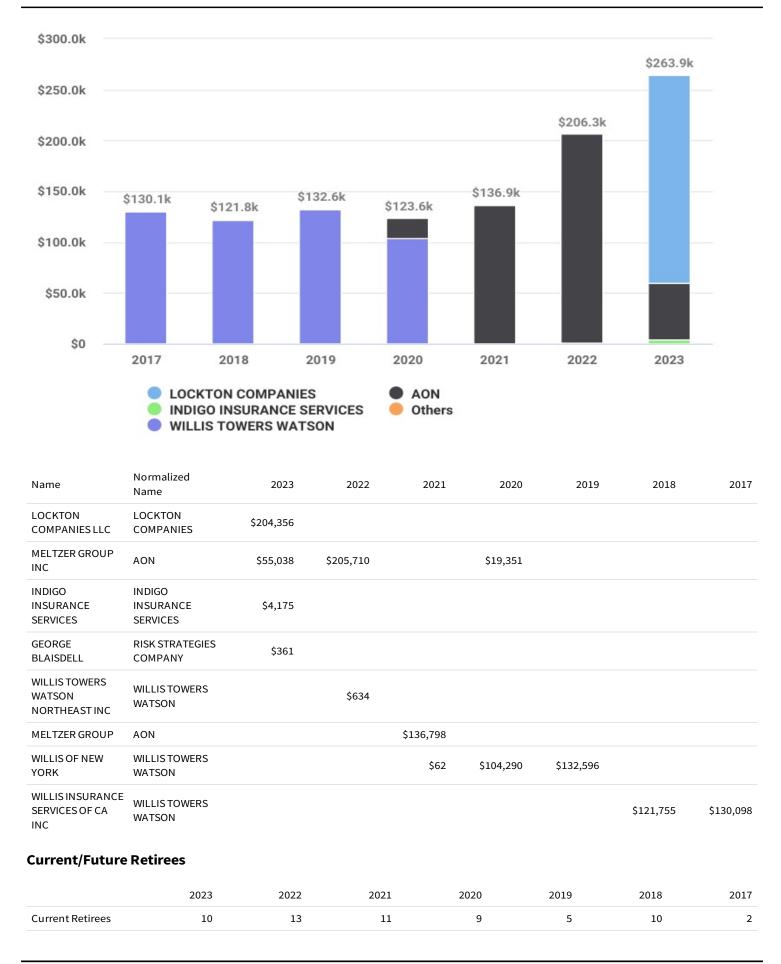
Premium, Commission and Fees



Premium per Employee

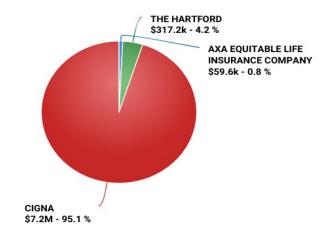


Broker History



Future Retirees 66 12 38 19 0 0 0

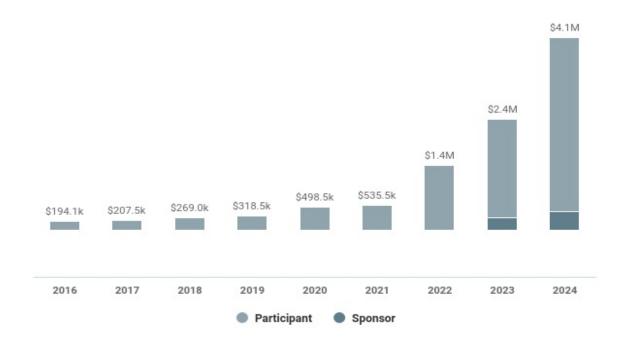
Spend By Carrier



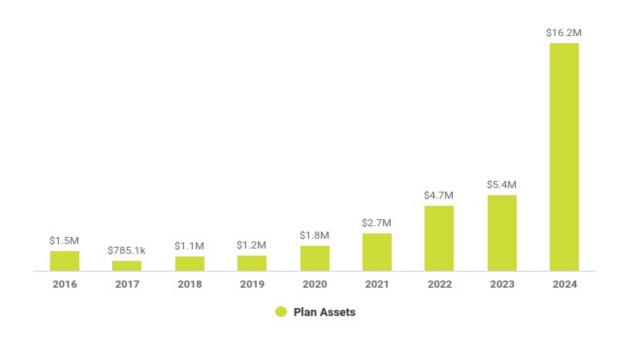
Name	Plan Types	Premium
CIGNA	Health Dental Vision Prescription Drug	\$7,246,273
THE HARTFORD	Life ST Disability LT Disability	\$317,170
AXA EQUITABLE LIFE INSURANCE COMPANY	Life ST Disability LT Disability	\$59,640

RETIREMENT

Contributions



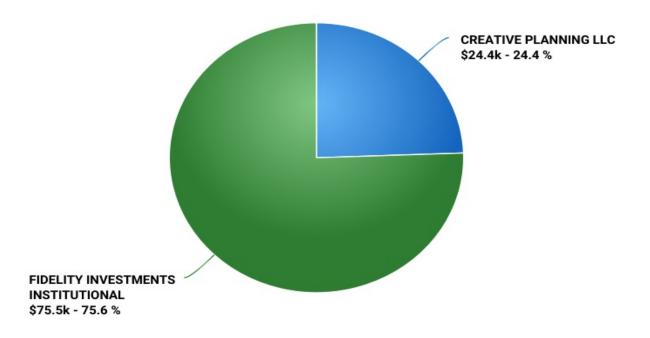
Plan Assets



Fidelity Bond

		Renewal	Beginning Assets	Ending Assets	Bond Amount	Ratio
	MONTE NIDO HOLDINGS 401(K) RETIREMENT PLAN	01/01/2024	\$5,430,646	\$16,237,975	\$1,000,000	18.41%

Spend by Retirement Service Provider



Service Provider Name	Service Types	Total Compensation
FIDELITY INVESTMENTS INSTITUTIONAL	Service Providers - Particpant Loan Processing, record keeping fees, account maintenance fees	\$75,532

CREATIVE PLANNING LLC Advisers - Inve

Advisers - Investment Advisory (Plan)

\$24,444

PLANS AND SERVICES

Benefits Plans

BENEFITS PLANS(3)	\$7.6M Premium \$263.9k Revenue	\$87.6k Commissio	n \$176.3k Fees
Health Dental Vision R Prescri	HMO ption Drug	PPO	MONTE NIDO HOLDINGS, LL Renewal: 08/01/202
Carrier CIGNA HEALTH AND LIFE INSURANCE COMPANY CIGNA	Premium	Participants	Premium/Participant/Month
	\$7.2M	879	\$687
	Revenue	Commission	Fees
	\$206.3k	\$39.1k	\$167.2k
	2.85%	0.54% (3.52%)	2.31%
Brokers LOCKTON COMPANIES LLC (DENVER, CO) LOCKTON COMPANIES	Revenue	Commission	Fees
	\$165.4k	\$31.4k	\$134.0k
	2.28%	0.43%	1.85%
MELTZER GROUP INC (BETHESDA, MD) AON	Revenue	Commission	Fees
	\$41.0k	\$7.7k	\$33.2k
	0.57%	0.11%	0.46%
etails ontract # 626529 ine of Business Health,Dental,Vision,Prescript	ion drug,HMO,PPC)	
Life Temporary Disability Long Ter Critical Illness/Cancer Wellness/EAP Oth		Voluntary (All)	MONTE NIDO HOLDINGS, LI Renewal: 08/01/20:
Carrier HARTFORD LIFE AND ACCIDENT THE HARTFORD	Premium	Participants	Premium/Participant/Month
	\$317.2k	788	\$34
	Revenue	Commission	Fees
	\$46.5k	\$41.6k	\$4.9k
	14.67%	13.12% (6.81%)	1.55%
Brokers LOCKTON COMPANIES LLC (DALLAS, TX) LOCKTON COMPANIES	Revenue	Commission	Fees
	\$32.5k	\$31.1k	\$1.4k
	10.23%	9.81%	0.43%
MELTZER GROUP (BETHESDA, MD) ♣️ AON	Revenue	Commission	Fees
	\$10.5k	\$10.5k	\$0
	3.32%	3.32%	0.00%
NFP CORPORATE SERVICES INC (CHARLOTTE, NC) AON	Revenue	Commission	Fees
	\$3.6k	\$0	\$3.6k
	1.12%	0.00%	1.12%
etails ontract # 891418G ne of Business Life Insurance,Temporary disa SSISTANCE PROGRAM, ACCIDENT, CRITICAL ILLNESS, I	ability,Long-term c	lisability,ACCIDENTAL DEATH	AND DISMEMBERMENT, EMPLOYEE
€ Life ¶ Temporary Disability 💃 Long Ter	m Disability	Wellness/EAP OO Other	MONTE NIDO HOLDINGS, LI Renewal: 08/01/202

Premium

\$59.6k

Participants

164

Premium/Participant/Month

\$30

Carrier

EQUITABLE FINANCIAL LIFE INSURANCE

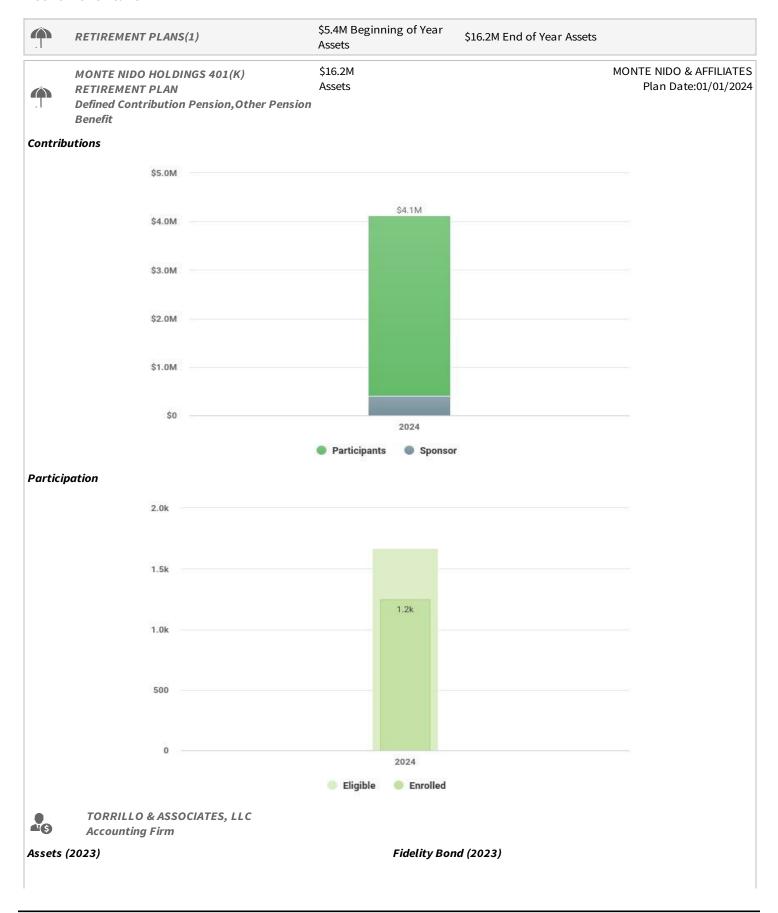
COMPANY OF AMERICA AXA EQUITABLE LIFE INSURANCE COMPANY			
	Revenue	Commission	Fees
	\$11.1k	\$6.9k	\$4.2k
	18.57%	11.57% (5.37%)	7.00%
Brokers LOCKTON COMPANIES LLC (KANSAS CITY, MO) LOCKTON COMPANIES	Revenue	Commission	Fees
	\$6.5k	\$6.5k	\$0
	10.97%	10.97%	0.00%
INDIGO INSURANCE SERVICES (BOSTON, MA) INDIGO INSURANCE SERVICES	Revenue	Commission	Fees
	\$4.2k	\$0	\$4.2k
	7.00%	0.00%	7.00%
GEORGE BLAISDELL (HAMPTON FALLS, NH) RISK STRATEGIES COMPANY	Revenue	Commission	Fees
	\$361	\$361	\$0
	0.61%	0.61%	0.00%
Details			

Contract # 8674

Line of Business Life Insurance, Temporary disability, Long-term disability, ACCIDENTAL DEATH AND DISMEMBERMENT, EMPLOYEE

ASSISTANCE PROGRAM

Retirement Plans



Beginning Ending	\$5,430,646 \$16,237,975 \$1,000,000(18.41%)	16
Average participant balance Plan Descriptions	\$13,053	
2E Profit-sharing 2G Total participant-directed Plan 2K Stock bonusCode section 401(m) 3H Member(s) of a controlled group	2F ERISA section 404(c) Plan 2J Code section 401(k) feature 2T Default investment account 3D Pre-approved pension plan	
Advisors	Service Providers	
CREATIVE PLANNING LLC Other Plan Details	\$24,444 FIDELITY INVESTMENTS INSTITUTIONAL	\$75,532
Other Fluir Details		
Participant Loans	\$137,785 Retirees Current/Future	1/489

Benefits Services



BENEFITS SERVICES

This company has not reported any Benefits Services

Retirement Services

00	RETIREMENT SERVICES	(2)	\$100.0k Direction Compensation		\$0 Indirect Compensation	on
00	FIDELITY INVESTMENTS Retirement - Service Pro		\$75.5k Total (Compensation		MONTE NIDO & AFFILIATES DINGS 401(K) RETIREMENT PLAN
EIN		042647786		Direct Comp	ensation	\$75,532
Service	Description	Particpant Loan Processing,recordk fees,account maint		Indirect Com	pensation	\$0
				Total Compe	ensation	\$75,532
00	CREATIVE PLANNING LL Retirement - Advisers	С	\$24.4k Total (Compensation		MONTE NIDO & AFFILIATES DINGS 401(K) RETIREMENT PLAN
EIN		844519624		Direct Comp	ensation	\$24,444
Service	Description	Investment Advisor	y (Plan)	Indirect Com	pensation	\$0
				Total Compe	ensation	\$24,444

INFLUENCERS



Benefits Brokers

LOCKTON COMPANIES	77.43%		\$204,356
LOCKTON COMPANIES LLC	8110 E UNION AVE STE 100	\$165,353	
LOCKTON COMPANIES	DENVER, CO		
LOCKTON COMPANIES LLC	PO BOX 650823	\$32,462	
LOCKTON COMPANIES	DALLAS, TX		
LOCKTON COMPANIES LLC	444 W 47TH ST STE 900	\$6,541	
LOCKTON COMPANIES	KANSAS CITY, MO		
ON	20.85%		\$55,038
MELTZER GROUP INC	6500 ROCK SPRING DR STE 500	\$40,957	
AON	BETHESDA, MD		
MELTZER GROUP	6500 ROCK SPRING DR STE 500	\$10,518	
AON	BETHESDA, MD		
NFP CORPORATE SERVICES INC	1901 ROXBOROUGH RD STE 300	\$3,563	
AON	CHARLOTTE, NC		
NDIGO INSURANCE SERVICES	1.58%		\$4,175
INDIGO INSURANCE SERVICES	401 PARK DR	\$4,175	
INDIGO INSURANCE SERVICES	BOSTON, MA		
SISK STRATEGIES COMPANY	0.14%		\$361
GEORGE BLAISDELL	65 BROWN RD	\$361	
RISK STRATEGIES COMPANY	HAMPTON FALLS, NH		

Total for MONTE NIDO & AFFILIATES - 2023 Benefits Broker Commission and Fees

PA

\$263,930



CL Brokers

Latest Policy Date: 12/21/2023 KING OF PRUSSIA AMTRUST NORTH AMERICA INC

AMTRUST NORTH AMERICA



Retirement Service Providers

In-Force revenue of \$75,532 FIDELITY INVESTMENTS INSTITUTIONAL

Service Providers

In-Force revenue of \$24,444 CREATIVE PLANNING LLC

Advisers



Accounting Firms

TORRILLO AND ASSOCIATES

TORRILLO AND ASSOCIATES

CONTACTS

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