




PROFILE



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SUIT 400
HOOVER
AL 35242



+1 (205) 991-7488




http://upstreamrehabilitation.com

MSID


M84000025102119

EIN


261209748



https://www.facebook.com/upstreamrehab/



https://www.linkedin.com/company/upstream-rehabilitation/



https://twitter.com/upstreamrehab

NAICS codes

621399 - Offices of All Other Miscellaneous Health Practitioners
621340 - Offices of Physical, Occupational and Speech Therapists, and Audiologists
621491 - HMO Medical Centers
622111 - Offices of Physicians (except Mental Health Specialists)
622110 - General Medical and Surgical Hospitals
624190 - Other Individual and Family Services
621498 - All Other Outpatient Care Centers
561110 - Office Administrative Services
62 - Health Care and Social Assistance
531120 - Lessors of Nonresidential Buildings (except Miniwarehouses)
and 2 others


Upstream is the leading national provider of outpatient physical and occupational therapy services, as well as practice management services.


 5,000 - 9,999 employees


\$


 200M - 1B revenue


	2024	2023	2022	2021	2020	2019	2018	2017	2016
Eligible Employees	6,249	6,131	5,995	5,239	4,819	1,831	1,729	1,399	1,077


 Key Influencers


 COBBS ALLEN & HALL INC
COBBS ALLEN - ASSUREX GLOBAL
Benefits Broker












 LOCKTON COMPANIES LLC
LOCKTON COMPANIES
CL Broker

 COBBS ALLEN & HALL INC
COBBS ALLEN - ASSUREX GLOBAL
Benefits Broker

 LOCKTON COMPANIES LLC
LOCKTON COMPANIES
CL Broker

 GLOBAL RETIREMENT PARTNERS LLC
Retirement Advisor/Consultant

 BLACK AND PINCKARD
Accounting Firm

Key Indicators	 M									
KPI's	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015
Mega Wrap	M	M	M	M	M	M	M	M	M	
Collectively Bargained										
Self-funded Employee Benefits										
Filing with no Schedule A										
Multiple Employer (Welfare)										
Multiple Employer (Retirement)										
Filing Status	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015

Summary report

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Page: 1














Delinquent Filing
First Welfare Filing
Final Welfare Filing
Extension Filed
First Retirement Filing
Final Retirement Filing

CONTACTS

Adrian Bartella <i>Form 5500 Signatory</i>	REHAB EMPLOYEE SERVICES, LLC BIRMINGHAM - AL	
Tory Drakeford <i>Form 5500 Signatory</i>	UPSTREAM NEWCO, INC. HOOVER - AL	
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PLANS AND SERVICES

Benefits Plans

 BENEFITS PLANS(1)		\$5.9M Premium \$854.5k Revenue	\$804.2k Commission	\$50.3k Fees
<div><div><div> Dental</div><div> Vision</div><div> Life</div><div> Temporary Disability</div><div> Long Term Disability</div><div></div></div><div><div>Voluntary (All)</div><div> Critical Illness/Cancer</div><div> Other</div></div><div>UPSTREAM NEWCO, INC. Renewal: 01/01/2024</div></div>				
<div><div> Carrier</div><div>METROPOLITAN LIFE INSURANCE COMPANY MET LIFE</div></div>		<div>Premium \$5.9M</div>	<div>Participants 7,283</div>	<div>Premium/Participant/Month \$67</div>
<div><div> Broker</div><div>COBBS ALLEN & HALL INC (MOUNTAIN BRK, AL) COBBS ALLEN - ASSUREX GLOBAL</div></div>		<div>Revenue \$854.5k 14.55%</div>	<div>Commission \$804.2k 13.69% (17.57%)</div>	<div>Fees \$50.3k 0.86%</div>
<div><div> Broker</div><div>COBBS ALLEN & HALL INC (MOUNTAIN BRK, AL) COBBS ALLEN - ASSUREX GLOBAL</div></div>		<div>Revenue \$854.5k 14.55%</div>	<div>Commission \$804.2k 13.69%</div>	<div>Fees \$50.3k 0.86%</div>
<div>Details</div> <div>Contract #216579</div> <div>Line of BusinessDental,Vision,Life Insurance,Temporary disability,Long-term disability,ACCIDENTAL DEATH AND DISMEMBERMENT,ACCIDENT,CRITICAL ILLNESS</div>				

INSIGHTS

BENEFITS

Broker History



Current/Future Retirees

	2024	2023	2022	2021	2020	2019	2018	2017	2016
Current Retirees	0	0	0	0	0	0	0	7	6
Future Retirees	0	0	0	0	0	0	0	0	0